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Teaching the Disembodied: Othering and Activity Systems in a Blended Synchronous Learning Situation

Una Cunningham
University of Canterbury, New Zealand

Abstract

This study examines what happens when online and campus students participate in real time in the same campus classroom. Before this study, postgraduate students studying online in a course intended primarily as professional development for language educators were taking the course through reading the course literature including assigned articles, writing reflective texts in the asynchronous forum and doing the course assignments. They had a very different experience than the campus students who met weekly for discussion of the reading. Some online students were not active enough in the course, and showed low levels of engagement. The online students were invited to participate in scheduled campus classes via Skype on iPads. After some hesitation, four of the six online students took up this real-time participation option. Initial difficulties with the technology were addressed after seeking input from campus and online students. A series of adjustments were made and evaluated, including a move to a model in which three online students in different locations participated in a single Skype group video call on a laptop in the campus classroom rather than on multiple individual Skype calls on iPads. After the course, the online and campus students were asked to evaluate the experience of having physical and virtual participants sharing a physical space and to relate this experience to the asynchronous channels previously available to the participants. The comments of both groups of participants were interpreted in the light of previous work on social presence and of activity theory. It appears that student beliefs and student expectations lead to hidden challenges associated with mixing these groups of students, and the study concludes that unless teaching assistance is available, it is not easy to afford online students the same right to speak as campus students.

Keywords: Distance; campus; blended; flexible; synchronous; Skype; VOIP; activity theory; othering; social presence

Introduction

Those who watched the UK TV-series, Doctor Who, in the 1970s (or who have seen some of the countless re-runs) may remember the Brain of Morbius, the title role in a set of episodes of the series. The evil Time Lord, Morbius, had been reduced to life as a brain in a plastic bowl. He could not move unaided, though he could speak and was actually quite demanding of those around him. The plight of Morbius came to mind in the particular approach to blended synchronous learning adopted in the postgraduate course that is the focus of this study. Campus students sitting around a seminar table in class were joined by a handful of online students, each occupying an iPad, placed so they could see their campus and online classmates and be seen by them. The online participants, like Morbius, were fairly helpless, needing assistance from another student or the teacher to move to another table to take part in small-group discussion or to turn to face the talker or the screen at the front of the room. Their ability to hear and be heard was at the discretion of the physically present. These were postgraduate students, studying online on a course intended primarily as professional development for language educators. These students are referred to here as online, rather than distance students as they are often not geographically removed at all, but prefer to study online because of the flexibility of online study in this particular postgraduate course, using various permutations of synchronous and asynchronous communication as they wish.

The problem under investigation is the reluctance of some online students to participate actively in the course asynchronous discussion forum on the university's Moodle-based learning platform. This apparent lack of engagement in the course meant that these students were not interacting. There was little rapport between the teacher and the online students and none at all between the students. Many online educators have considered ways to increase student interaction in online courses (Murphy & Rodriguez, 2012). A study by Power and Vaughan (2010) claimed that synchronous online interaction between students will "reduce learner isolation through real-time dialog and co-construction team activities (p. 23)". They further suggest that students will get more out of a course if there is real-time contact between students. Student isolation and failure to engage with the course materials and activities may mean that the flexibility offered by online studies is sometimes countered by a lower completion rate (Power & Vaughan, 2010). It is often difficult to engage remote learners, who may have chosen online study because of work and family obligations (James, Krause & Jennings, 2010), meaning they have little time for their studies.

Previous experience on this course was that some online students who interacted with their fellow students only through the asynchronous forum were disengaged and reluctant to communicate more than minimally. Studies of social interaction using

asynchronous modes of communication suggest that a sense of shared purpose is essential to successful online interaction (Westberry & Franken 2013). However, students who only communicate asynchronously with their teachers and fellow students may miss out on "collaborative learning activities, which are a cornerstone of contemporary social constructivist pedagogical approaches" (Bower, Kenney, Dalgarno, Lee & Kennedy 2013, p. 92). Bower et al. also point out that because of this lack of interaction, and reliance on asynchronous written communication, online studies are sometimes, e.g. in Australia, not seen as equivalent to face-to-face learning.

Clearly the conditions of technology-mediated communication as well as the individual situations of students who choose to study online complicate the need for well designed courses that offer flexible options for interaction between students and with the teacher. For those students who attend real-time classes, whether on campus or online, a social context is provided. For students who cannot join the real-time classes, other options need to be offered.

The aim of this study was to investigate possible ways to reduce the isolation of online students and to extend to them something of the social and educational advantages experienced by campus students who are able to interact with the teacher and with each other in real time. The online students were offered the opportunity to virtually sit in on campus classes in real time. The learning experiences of both online and campus students were assessed, and the intervention was refined accordingly and then reassessed.

Method

To facilitate interaction between participants in the course at the focus of this study, the six online students were invited to participate in real time in a scheduled campus class with the twelve campus students via Skype on iPads in a blended-synchronous model. The purpose of this invitation was to allow engagement in what White, Ramirez, Smith and Plonowski (2010, p. 35) termed "a similar manner to on-campus students". This was in order to create the basis for a social constructivist learning environment. After initial hesitation, due to time constraints, work commitments or the high cost of broadband connectivity, four online students engaged in the online synchronous participation option. The means of communicating synchronously with the online students during the campus class was introduced, evaluated and refined in an iterative approach.

The experiences of the campus and online students were elicited twice, firstly informally in class and by inviting e-mail comments, and secondly by inviting them to participate in an anonymous written evaluation of the teaching set-up via Google Forms. Observations, spontaneous comments and elicited responses were considered with respect to the community of inquiry constituted by the course, in particular as regards

the social presence of the online participants from the perspective of the campus participants. In addition, the course was analysed as partly overlapping activity systems following aspects of activity theory as characterized by Nardi (1996).

Results

First Cycle

In the first attempt to solve the problem of the disengaged online learners, four iPads were brought into the classroom (each with a different Skype account so they could host simultaneous individual Skype video calls), one for each of the four online students who had expressed willingness to participate in the real-time class with some twelve campus students. The iPads were placed around the table, between campus students such that nearby campus students were asked to turn an iPad as required. This set up was used for the first half of the course, six seminars. During the seminars, problems (such as dropped calls, or online students sitting in noisy environments) and effects arising (such as students experiencing difficulty hearing the online students when the classroom became noisy during small group discussion) were noted. In the sixth seminar of the course, all the participants were asked openly for their thoughts on a) how they thought the course was going in general and b) their thoughts and suggestions about the blended synchronous model with the iPads, and they were invited to mail the lecturer with any further points that they were not comfortable sharing openly.

Observations and spontaneous comments suggested that the model in which online students were each represented in the physical space of the classroom as a face on a tablet device led to them being seen as real people by the campus students. Campus students looked at the faces on the iPads as though they were classmates and would glance in their direction when referring to a point made by a online participant. This can be termed perceived social presence (Kim 2011; Hostetter & Busch 2013). Social presence has been defined as the “degree to which a person is perceived as a ‘real person’ in mediated communication” (Gunawardena & Zittle, 1997, p.9).

The discourse in the focus classroom evolved so that campus students began to refer to the online participants in a way reminiscent of the way disabled campus students might be referred to, that is, when a campus student was asked to help a named online student to turn to see the board, rather than being asked to turn the tablet. However, it also became apparent that the two groups of students, the virtual and the physical, were having partially different classroom experiences (c.f. Westberry & Franken 2013). Some campus students were reluctant to take responsibility for facilitating for a online student by taking them along to another table for a small group discussion or turning the iPad to face the speaker in whole class teaching or discussion.

One of the constraints of Skype on an iPad using the built-in speakers was that it was not full duplex, meaning that the sound was not transmitted simultaneously in both directions, so that in noisy environments the sound would not be received well. In the classroom, this meant that while whole class teaching and discussion where one campus or online participant at a time was talking went well, as soon as small group or pair discussions started, the online participants had difficulty hearing, and the ambient noise meant that the campus students had difficulty hearing the online students. Campus and online students raised their voices to attempt to be heard, which made things more difficult. The volume of the iPads was raised to max, which meant that the online students' voices were perceived as penetrating and somewhat abrasive. These sound problems led to some irritation in both groups.

The positive experiences of this set-up, with the online students present on iPads, were that they were able to ask questions during class, that they could join in whole class and small group discussion and that they got to know the campus students and each other a little. The negative experiences included the sound problems with the students' voice quality and their difficulty hearing what was going on when the room became noisy, that not all online students were able to or chose to join the campus class, and that the forum activity was much less than before, as the most active students were the ones who had accepted the invitation to participate in real time.

Second Cycle

In an attempt to solve the problems experienced in the first half of the course, namely a reluctance by some campus students to be responsible for facilitating for their remote peers, and the specific sound problems caused by the set up, a new set-up was implemented. The first adjustment was to set-up a Skype account that allowed multiple participants on video calls. This meant that the online students participated in a group video call on a laptop rather than on multiple individual Skype calls on iPads. The second adjustment was that the lecturer took on the responsibility of facilitation for the online students, turning the computer so the webcam captured the person speaking at any time. The third adjustment was in the way small group discussion was treated. The participating online students (by now only three or sometimes two) were treated as a single group for small group discussions, and the computer microphone and speakers were disabled during the group discussions, meaning that the online students could neither hear what was going on in the classroom, or be heard by anyone in the classroom during the small group breakouts.

The remainder of the course proceeded in this way. The new order of the reduced physical presence of the two or three online students, now on a single laptop rather than each occupying an iPad worked with fewer sound problems. On one occasion, one of the online students had children in the room and did not know how to disable the computer microphone. This meant that the computer speakers had to be temporarily disabled, leaving the other online students unable to participate orally, although they could still

use the text chat function. When one of the students lost the connection with the call, the lesson paused while the teacher reconnected the call.

A teaching assistant who could deal with technical hiccups would have made things a lot easier for the teacher and caused fewer delays for the other students. This is in line with the findings of White et al. (2010), who also point out that a second teacher in the room would make using technology a lot easier, although in their study they did not elicit feedback from campus students. Bower et al. (2013) reported case studies where teachers claimed that having a teaching assistant was highly advantageous in helping to deal with the increased cognitive load required to manage blended synchronous learning classes. They also identified capturing and managing audio discussions as a major challenge of the blended synchronous teaching (p. 100). In fact, most of the case studies reported by Bower et al. did not allow online students access to the microphone, which is a clear disempowering of these students, but a concession to the constraints of blended synchronous learning, as managed by a single teacher.

Elicited Feedback from Online and Campus Students

Towards the end of the course, the online and campus students were asked to anonymously evaluate the experience of having physical and virtual participants sharing a physical space and to relate this experience to the asynchronous channels previously available to the participants (cf. Garrison & Cleveland-Innes, 2005). This evaluation was separate from the regular student course evaluation, and focused entirely on the mode of teaching. Using Google forms, students were asked to respond to the following prompts:

- What, in your opinion, has been positive about mixing campus and online students?
- Have you studied online in other courses? If so, was there any real time communication? Please explain.
- What is your experience of studying in this course?
- What, in your opinion has been negative about mixing campus and online students?
- We changed from using several iPads with one online student per iPad to having a single Skype conversation on the laptop. Did this make a difference to you? Please explain.
- Please give any other comments and advice about including online students in class for next time I run this course.

Table 1

Summary of Students' Experiences of Blended Synchronous Learning

Positive	Negative
Online students	
Input from more people Building relationships	Feeling unwelcome
Campus students	
Input from more people Accessibility	Time fixing technology Online students prioritised by teacher Sound problems Social cues Facilitating for the online students

Eleven students chose to respond, eight campus students, two online students, and one student who reported having taken part in both campus and online modes. A number of students did this, both online students who found themselves on campus at class time, and campus students who had to stay at home for personal reasons. The responses were carefully considered and a number of themes emerged. These are presented in Table 1. See the Appendix for full survey responses.

While the online students appreciated being part of the class and hearing the teacher and taking part in discussions, they did not quite feel welcomed by the campus students. Some of the comments from campus students suggest that this feeling was well-grounded, as there seemed to be some resentment of the time and effort taken to satisfy the technical needs of online students, and a lack of understanding of the affordances of their mode of participation regarding their perception of social cues.

The students in both groups were also asked to comment on the move from using several iPads with one online student per iPad to having a single Skype conversation on the laptop. Their responses are summarised in Table 2, again with full responses in the Appendix.

Table 2

Summary of Students' Experiences of Laptop Versus Multiple Ipads

Campus students	Online students
Sound quality Online students own group an advantage No difference	Sound quality Online students own group a disadvantage.

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The isolation of the online students for small-group discussion was seen as a disadvantage by the online students but as a relief by most campus students who mentioned it. Both groups (online and campus students) reported seeing the other group as quite separate from themselves. This is similar to the othering described by Palfreyman (2005), with both groups talking about *us* and *them*, with little realisation that they were in fact very similar to each other; the online students expressed feeling excluded from the campus students' social community. This was interesting since there was actually some movement of students from campus to online and viceversa. There also seemed to be a monitoring of teacher time and attention dedicated to the other group on the part of some participants in both groups.

Presence in Online Learning Situations

The tensions between online and campus students in this study appear to be partly due to the perceived reality of the online students, and their status as full members of the class community. The aim of the study was to afford the online students greater access to the class community with a view to enhancing their socio-constructivist learning experience. The idea that learners as a community of inquiry can together discover more than each individual alone is capable of was developed by a series of scholars including Peirce, Wells, Lipman and Sexias (Pardales & Girod, 2006). Lipman (2003 pp. 95-100) lists some features of communities of inquiry including inclusiveness, participation, shared cognition, face-to-face relationships and feelings of social solidarity. Some of these features are noteably lacking in the blended group at the focus of this study. Of face-to-face relationships Lipman writes "these relationships may not be essential to communities of inquiry, but they can be very advantageous. Faces are repositories of complex textures of meaning that we constantly try to read and interpret" (p. 95) The computer-mediated communication of the blended synchronous classroom, especially when several faces appear as small images on a single screen, is not conducive to this kind of interpretation of meaning.

Garrison and Anderson (2003) reported their application of the community of inquiry model to online learning, where the components of cognitive presence, social presence and teaching presence interacted. They had earlier defined social presence as "the ability of participants in a community of inquiry to project themselves socially and emotionally, as real people (i.e., their full personality), through the medium of communication being used."(Garrison, Anderson & Archer 1999, p. 94). Social presence is clearly highly relevant to the experience of the participants in the course described in this study. If the online students are perceived as real people by the campus students, even if they are not able to move independently and have limited vision and hearing, they are worthy of all the consideration due to disabled classmates. Garrison offered a new, farther-reaching, definition of social presence as "the ability of participants to identify with the group or course of study, communicate purposefully in a trusting environment, and develop personal and affective relationships progressively by way of

projecting their individual personalities" (2011, p. 34). The campus students achieved this in the course studied in this paper; the online students less so, though considerably more so than when they only interacted through asynchronous text-based forums.

However, Gunawardena and Zittle (1997) found that social presence alone may be a very strong predictor of satisfaction in online learning, and they cite earlier work by Short, Williams and Christie (1976) ranking text-based computer-mediated communication (devoid of nonverbal codes that are generally rich in relational information), audio only communication and video (or television as it was in the 1976 study) in increasing order of social presence. Gunawardena and Zittle (1997, p. 9) conclude that "the capacity of the medium to transmit information about facial expression, direction of gaze, posture, dress, and nonverbal cues all contribute to the degree of social presence of a communications medium". Increased connectivity and technological development have led to richer media being available for educational communications, and the affordances of the communication tools now used facilitate considerable social presence.

The role of technological development in the tools available for online education is also mirrored by pedagogical development, as noted by Garrison (2012), responding to a article by Annand (2011) which questioned the importance of social presence. Garrison pointed to a generational shift from distance education, which was, he claimed, concerned with information transmission, to online learning in a collaborative constructivist approach with "collaborative discourse in purposeful communities of inquiry" (2012, p. 251). The course discussed here is designed so that the co-construction of knowledge by collaborative discourse is at its centre. Without interaction, the learning in a course of this kind will be essentially different and fail to be enriched by the collective professional experiences of the group. Any online students who do not engage with their classmates will miss out on large parts of the intended learning. The interaction needed for this kind of learning requires students to experience their own and their peers' social presence in the community.

Other components of online presence may also have a bearing on the perception of students. Cleveland-Innes and Campbell (2012, p. 283) considered emotional presence to exist alongside social presence, and define it as "the outward expression of emotion, affect and feeling by individuals and among individuals in a community of inquiry as they relate to and interact with the learning technology, course content, students and the instructor". The responses elicited from the participants in the course in this study, where online students sometimes felt that their comments were not picked up by campus students, suggest that the need for recognition and appreciation from the teacher and fellow students experienced by some students is a hinder to their interaction, and must be addressed.

Similarly, the learning experiences of the students will vary according to the way they engage with the material and the other participants. Akyol and Garrison (2011) discussed the role of cognitive presence, and cited early work on deep and surface learning approaches by Marton and Säljö (1976) as relevant to the context of online

learning. Akyol and Garrison reported different levels of social, cognitive and teaching presences in online and blended courses and concluded that "cognitive presence in a community of inquiry is strongly associated with high levels of perceived learning" (2011). They noted that students in a blended course had higher perceptions of learning, satisfaction, cognitive presence, teaching presence and social presence than those in an online course. This was attributed to the blended students having weekly discussions in face-to-face meetings. The affordances of the tools used in the current study were such that all students, campus and online, were able to participate in intergroup and intragroup discussions.

Activity Systems

Activity theory as developed by Engeström from Leont'ev's earlier work, and described by Nardi (1996) offers a set of conceptual tools for describing a technology-mediated activity. Nardi noted that "technology use is not a mechanical input-output relation between a person and a machine; a much richer depiction of the user's situation is needed for design and evaluation" (p. 4). Nardi described activity theory as "…a powerful and clarifying descriptive tool rather than a strongly predictive theory" (p. 6) and this is how it has been used here, to clarify the tensions between the different groups of students. Activity theory allows activities to be described as systems with specific roles for the subject and object, considering rules, instruments or mediating artefacts, division of labour and community.

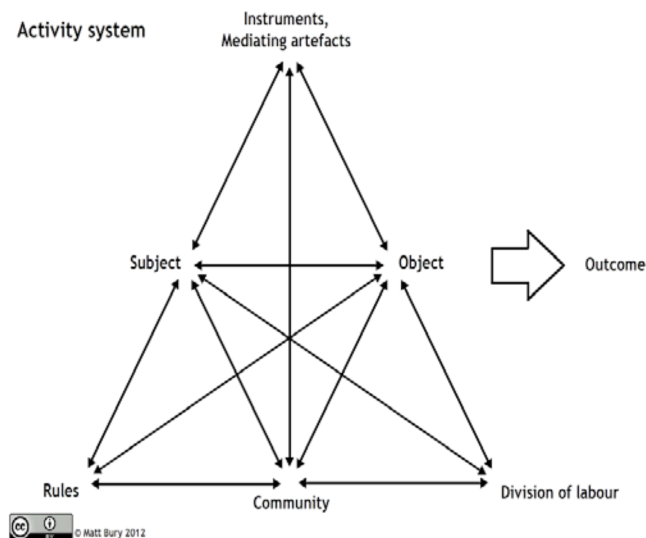

Figure 1. Activity system from Bury (2012).

Previous studies have applied activity theory to higher education settings (Barab, Evans & Baek 2004; Brine & Franken 2006) and have found the model helpful in describing the dynamics of classes, looking at aspects of the seminars as activities with subjects and objects and rules for each group. It appears that student beliefs and student expectations lead to hidden benefits and hidden challenges associated with mixing these groups of students (Westberry & Franken 2013).

Recent work applying activity theory to technology-mediated higher education (e.g., Murphy & Rodríguez-Manzanares, 2014) suggests that this approach can give insight into the tensions that arise when activity systems overlap. Applying the lens of activity theory to the study at hand, the comments of both groups of course participants were interpreted to inform the description of each group's activity system. Consider Figure 1 and Table 3 where the activity systems of online students and campus students are explored separately.

From this analysis it can be seen that campus and online students are working towards the same outcome, discussion and learning in order to complete the course successfully, but they are not operating in the same community or according to the same rules.

Table 3

The Activity Systems of Online and Campus Students

	Online students	Campus students
Subject	Online students	Campus students
Instruments	Skype, laptop or iPad, forum	Classroom meetings
Object	Achieving the learning outcomes and passing the course	Achieving the learning outcomes and passing the course
Rules	As afforded by Skype.	Face-to-face communication. Interpreting gaze and other social cues
Community	All students and teacher	Campus students and teacher
Division of labour	Campus students and teacher need to facilitate. Campus students should be willing to help and to welcome online students	Teacher teaches and campus students participate actively and independently

The tension arises because the online students believe they are part of the campus students' community, and the campus students expect them to behave like physically present campus students and conform to the same norms, even though their instruments are different and have different affordances. Both groups expressed resentment of the other group; this arises from the two groups not realizing the differences between their situations with each expecting the other group to behave more like themselves. Clearly, things would have progressed more harmoniously if all the

students were aware of the needs of both groups, and if clear rules for classroom discourse had been co-constructed with the students at the beginning of the course.

Conclusion

One of the fundamental differences between campus and online students is that campus students occupy a physical space in the classroom. They are each assigned a seat and a few decimeters of table space. They are represented in the classroom by their bodies in full size, with all that means in terms of being able to use facial expression, gesture and body language to add to anything they might actually say in class, either to the class as a whole, to the teacher or to the person sitting next to them. Online students, on the other hand, do not have their physical body in the classroom. Like Morbius, they are disembodied. They do not have access to these same linguistic, paralinguistic and extralinguistic means of expression. Depending on the way the course is set up, on courses that also have a campus occurance, online students may be able to view recordings of campus classes or to view them in real time (like a fly on the wall). In the latter case they may be able to interact with the teacher, the other online students and/or with the campus students. This interaction is often accomplished using text chat rather than voice communication.

The blended synchronous set-up including online students in the classroom via Skype on individual tablets described in this study was an attempt to address the limitations of this kind of fly-on-the-wall experience. However, even in the most empowering set-up described in this study, the online students could be silenced or rendered deaf or blind at the flick of a switch, and they could not move themselves independently to turn to see who was speaking or to the board.

The justification of this study was to move some way to compensating the online students for these limitations. By allowing each online student to participate in the class via an individual Skype connection on a tablet, they were each represented in the physical space of the campus classroom by the moving image of their head on the screen of the tablet. While they were still not physically present in the classroom, they were represented in physical space, embodied in the tablet, in a way that was lost when the move was made to having several online students communicating via a single Skype channel on a laptop. While their moving heads could still be seen in the second set up, they had lost their position around the table, each as an individual student, taking a place among the other students.

If online learners can be said to be disembodied, giving them a physical presence increases their social presence as perceived by campus students. Synchronicity of interactions between online and campus students can increase the sense of community and perceived by online students.

An important insight gained from this study was that, given their reduced ability to pick up on the social cues of the campus students (raised hands, gaze, impatient fidgeting, etc.), it was difficult to afford online students in a blended synchronous classroom free access to speaking rights. Instead, they could be asked to indicate when they want to say something (in text, or by raising their hands, literally or otherwise), or even be limited to written participation if there are more than a few of them.

Moving on from the course described in this study, the decision was made in a subsequent blended synchronous course to use Adobe Connect for live streaming from the campus class. Online students could participate in real time, and could, if they chose, activate their webcams and microphones. Preliminary findings from this course suggest that online students who had never experienced having a voice in the campus classroom did not miss it, and threw themselves enthusiastically into real-time text chat communication with each other, the teacher and the campus students, actually being reluctant to switch on a microphone when asked to do so for a discussion, and choosing not to activate their webcams. There was also an increased degree of movement from campus to synchronous online participation in this class, as students choose to stay at home and sit in on the campus class from the comfort of home. Also, as the Adobe Connect sessions were recorded, and the recordings were made available to all students, some students preferred to view after the event, mailing any questions that arose as they viewed the classes to the teacher.

This drift of some students from campus to the digitally mediated synchronous classes led to a decision by the teacher to move new courses away from campus altogether, being set up as online only, combining the advantages of non-transient pre-recorded lectures, live webinars and online tutorials (Q&A sessions) which are recorded for later (re)viewing and asynchronous forums. This kind of course is quite different than the blended synchronous course that is described in this study, but the flexibility it offers is greatly enhanced. The physical classroom experience is sacrificed, but the online experience will be better, and there will no longer be a distinction between campus and online students, though the distinction between the students who participate in live webinars and tutorials and those who view only recorded material may become more prominent. More research is needed to examine the student experience in this kind of course, and to see if students miss the classroom.

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Appendix

Table 1

Summary of Students' Experiences of Blended Synchronous Learning

Positive	Negative
Online students	
Input from more people • I really benefit from hearing the ideas of other students and also hearing the lecturer's discussion with them. Building relationships • A platform for me to build professional learning relationships between both lecturer and other online students	Feeling unwelcome • They weren't very welcoming…I felt at times like a fly on the wall watching! • The campus students appear to have no interest in interacting with the online students! • It's a shame that the campus students didn't feel confident to join in with the on line students discussion times. • When there are whole classroom discussions, they rarely have any feedback about what we are saying. Yet it seems like they are more likely to comment on things that are said by peers in the classroom.
Campus students	
Input from more people • Because it's a small group it's nice to have other people's experiences shared. • Being able to hear more opinions. • Allows them to take part in discussion and add their viewpoint. • They also provided additional diverse ideas at times. • The various opinions from online students can be brought into classrooms. • It has expanded the range of ideas and input for the on-campus students. Accessibility • Having that option if unable to attend class on campus. • like the accessibility of it for all.	Time fixing technology • Some time was spent at the beginning and during each session connecting. • Waiting around when technical hitches occur Online students prioritised by teacher • Screens can become the focal point, possibly excluding campus students at times • Unequal amount of speaking • Just getting their own queries answered which should not take place in group lecture time Sound problems • Classes become noisy, hard to hear what is said. • The technical difficulties - volume etc - the online students have sometimes experienced. • It was also challenging to be part of a small discussion group with a skype person This seemed to improve once

• Good to include online students and make them feel part of the course. • It's great to have the online students as real faces not just a photo on Learn. • It enables the online students to be a part of the class. • It has been good for us to hear from and share viewpoints with the online students in 'real time'. • mainly, and hugely, advantageous for the online students - to feel more a part of the class and also have access to other student input. • It is great for the online students that they are able to access the seminars.	they were on one device. • The background noise of the online students. Difficulties in using devices to speak to and include the online students due to noise and volume. • Sound problems (background noise) • I switched out from the online people at times. Social cues • Online students do not get the visual cues for turn taking or when someone else wants to speak. • On-line students demanding immediate attention, cutting in, not being there to read others body language eg. someone about to speak. • Lack of turn taking • Using iPad/laptops prevents social cues from being recognised. Makes communication a bit difficult. Facilitating for the online students • we sometimes forget to turn the viewing screen around, so that the online students are sometimes left hearing our speakers, but facing nothing.

Table 2

Summary of Students' Experiences of Laptop Vs Multiple Ipads

Campus students	Online students
Sound quality • Better - easier to hear and have small group discussions. • Much better. Easier to focus, sound direction better. • Acoustically it seemed better when the online students were on a single conversation. Online students own group • Better too that the online students were then their own group so everyone wasn't competing to be heard. • Yes this worked much better as laptop	Sound quality • The benefit of putting the online students together on one iPad is that the sound quality was better and in general, the lecturer attempted to turn it towards whoever was speaking. • Yes it helped with sound. Online students own group • It was nice to get to know the other online student but we often missed out on other discussions • For small group discussions, I didn't like being shut off from the rest of the

positioned centrally so all online students seeing the same thing, and also better sound for all to hear from both sides. It seemed that then the online student could talk together on the breaks which I think was possibly valuable for them.

No difference

- No much difference for me as long as on-line students can be organised into the class.
- Not really. Found all the annoying issues as above still relevant
- It was better with [a single] skype. Everyone was in the same conversation, easier to hear and follow what was happening campus students.
- I think that for small group discussions, one of the campus students should have been grouped with us with a headset and microphone.
- Why didn't the campus students join on line students in the discussions? All they needed to do was take the iPad put on some head phones and join in.
- The multiple ipad scenario would have worked better if each online student could have been paired up with one person in the campus class to "look after them". The downside to this would be if the campus student doesn't feel like they want to be responsible for the distant learner.

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INVESTIGATING “OTHERING” IN VISUAL ARTS SPACES OF LEARNING

Monique Biscombe
Stellenbosch University
biscombemonique@gmail.com

Stephané Conradie
Stellenbosch University
stephaneedithconradie@gmail.com

Elmarie Costandius
Stellenbosch University
elmarie@sun.ac.za

Neeske Alexander
Stellenbosch University
neeskealexander@gmail.com

ABSTRACT

In the political, social, cultural and economic context of South Africa, higher education spaces provide fertile ground for social research. This case study explored “othered” identities in the Department of Visual Arts of Stellenbosch University. Interviews with students and lecturers revealed interesting and controversial aspects in terms of their experiences in the Department of Visual Arts. Theoretical perspectives such as “othering”, symbolic racism, the racialised body and visual art theory were used to interpret these experiences. It was found that “othering” because of indirect racism and language or economic circumstances affects students’ creative expression. Causes of “othering” experiences should be investigated in order to promote necessary transformation within the visual arts and within higher education institutions.

Keywords: othering; racialised body; transformation; visual arts; language

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INTRODUCTION

Higher education institutions represent critical spaces for learning in which dialogues between people from diverse backgrounds are encouraged. These interactions should build environments where difference is recognised. This includes recognising the categorical differences we project onto those who are “other” than ourselves in order to make sense of the difference we experience (Oloyede 2009, 427). Ideally, acceptance and celebration of difference should be evident in higher education institutions. The promotion of an identity that embraces multiple loyalties instead of producing conflict could lessen the gap between members of different cultural and racial backgrounds (Costandius and Rosochacki 2012).

In universities that were historically predominantly white, opportunities now exist for black students to enter. Although many of these institutions are making progress with regard to a numerical representation of black students and staff, a lack of “meaningful intergroup interaction” still exists between members of different racial groups (Oloyede 2009). Stellenbosch University’s position presents a twofold dilemma, because the demographic representation does not reflect that of South Africa and because the creation of inclusive environments for all students remains difficult. Many black students simply do not want to enter a place where their difference may set them apart from the rest of the largely racially and culturally homogenous student community (Costandius and Rosochacki 2012).

Stellenbosch University, designated as a race-specific (“white” Afrikaner) institution during apartheid, played a critical role in the cultivation of South Africa’s painful history. The university supplied the government with more than one of the National Party’s ministers. Stellenbosch University promoted a culture of “white supremacy” during apartheid and this subtly continues in new forms present on campus (Odendaal 2012).

This study aimed to explore “othered” identities within a South African political, social, cultural and economic context and, more specifically, the related challenges that may exist within higher education spaces of learning. The Department of Visual Arts at Stellenbosch University was used as a case study in order to analyse the ways in which students experience “othering”. Personal biographical experiences were collected from lecturers and students. Theoretical perspectives such as “othering”, symbolic racism, the racialised body and visual art theory were useful for interpreting these experiences. Excerpts from the interviews conducted with participants are presented, followed by a discussion of the data.

THEORETICAL PERSPECTIVES

Othering

This case study examined instances of “othering” experienced by marginalised identities within visual arts spaces of learning. It is therefore important to expand on the

concepts of the "other" and "othering". While varying viewpoints of "othering" exist (for example the "fascinating other") we chose the specific frame of "othering" and the "other" that is presented below. This frame is mainly based on the readings of Spivak (1985) and Jensen (2009). Framing the "other" as inferior, subordinate and unable to access education is relevant within the context of higher education institutions because it is part of the racialisation process that prevents transformation.

The concept of the "other" is complex in its definition. First, humanity is divided into two groups: one embodying the norms, whose identity is valued, and another defined by its faults, "devalued and susceptible to discrimination" (Staszak 2008, 1). Second, as presented by Gillespie (2007, 2),

> the representation of the other is deeply entwined with the representation of self...[O]thering occurs when Self represents Other in terms of what Self is not (and in terms of what self does not want to be) in a way that is "self-aggrandizing".

For this reason, the "other" exists because of binaries in relation to the self. This concept relates to a Hegelian heritage (1947) in which the juxtaposition with the "other" composes the self (Jensen 2009).

"Othering" describes a multidimensional process that touches upon "several different power asymmetries"[1] (Jensen 2009, 10). Postcolonial writer Gayatri Chakravorty Spivak (1985) was the first to use the notion of "othering" in a way that was systematic (Jensen 2009, 7). By investigating representations of history, she identified three forms of "othering".

The first form of "othering" involves an awareness of who holds the power. Those who are powerful produce the "other" as subordinate (Jensen 2009). The second form views the "other" as "pathological and morally inferior". Those classified as "other" are considered "uncivilised, uneducated and barbaric" in nature (Jensen 2009, 10). The third form of "othering" involves denying the "other" access to knowledge and technology. This process establishes a "manipulative pedagogy" that produces an unnatural difference between native and master. This power imbalance allows those with power to maintain that power (Jensen 2009, 10). The "other" is therefore understood as being an inferior "other" and not a fascinating "other" (Jensen 2009). "Othering" plays a key role in racialisation, because it defines bodies as "other" according to race.

In the past, discourses of racialisation were used by the apartheid state to develop institutions and processes devoted to producing and transmitting knowledge that would support the apartheid agenda (Ratele and Shefer 2003). Each body affected by the discourses imposed by the apartheid state continues to be reactive to the "other" or defined against it. A symbolic agreement is reached where "harmony" between the self and the "other" exists and where the "other" does not challenge the notions of self set up

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1 "The insistence of the specificity of othering of ethnic minorities, because it relies on racist assumptions about 'visibly different minorities', may include physical abuse" (Garland and Chakraborti 2006, 150–177).

by the dominating body (Bignall 2008, 131). Similarly, students who see themselves as different may feel that it is better for them to be assimilated into their environment. This possibly prevents further isolation by accepting dominant ways of thinking and being. Some students, however, may choose to live in the isolation they experience because of their difference. Students who are different from the majority may experience "othering" due to a lack of community in which they can "fit in" and find accountability.

Symbolic racism, symbolic power and symbolic violence

David Sears (1998 cited in Ratele and Duncan 2003) developed the term "symbolic racism" in order to describe and articulate racism and its development within the USA. He argues that traditional forms of racial discrimination are no longer obvious and visible. Contemporary forms of discrimination could consist of more subtle plays of power through muted violence. "Symbolic racism" is defined as emerging forms of prejudice and discrimination. This includes denying the existing patterns of racial inequalities, resentment of redress and antagonism towards demands for removing racism in society (Ratele and Duncan 2003). Contemporary racial discrimination can therefore be identified as "symbolic racism". "Symbolic racism" may be exercised outwardly through various plays of power and subtle violence. Bourdieu's (1991) development of the two concepts of "symbolic power" and "symbolic violence" may make valuable contributions to our understanding of "symbolic racism".

"Symbolic power" has two distinct features. First, it does not reside in systems, but is defined in and through a given relationship between those exercising power and those submitting to it. Legitimacy and belief in words and slogans are created. This belief is produced and reproduced while maintaining or subverting social order. Second, "symbolic power" is a subordinated power that is a "transformed, misrecognizable, transfigured and legitimated form of the other forms of power" (Bourdieu 1991, 170). The process of "symbolic violence" becomes possible through "symbolic power". An imbalance of power is cultivated that perpetuates the "other" as inferior by those exercising this power.

"Symbolic violence" refers to violence that is not physical or visible, but exists on a subtle level. This "violence" is felt on an unconscious level through body language, words and actions. It is difficult to pinpoint, but it remains deeply ingrained in individuals, without their awareness of it (Bourdieu 1991). "Symbolic violence" is the natural progression from "symbolic power" once the "other" eschews words, slogans and norms that are created and accepted by the dominant group (Bourdieu 1991). Therefore, "symbolic racism" is assisted by the presence of "symbolic power" and "symbolic violence".

As the "symbolic racism" experienced by students may very well be more subtle and less confrontational, the use of the terms "symbolic power and violence" could give definition and lucidity to how this experience is perpetuated. Students of

colour are no longer barred from entering a previously whites-only university like Stellenbosch University, but they still feel "othered" and isolated from the community. The discrimination is obviously subtle. By describing how "symbolic racism" may be perpetuated through and assisted by "symbolic power and violence" we may more fully understand the levels of racism experienced by students.

The racialised body

The "body" in this study is viewed as a vehicle for the development of discourse. The body carries historical definitions that place it within a racial group. In spite of many anti-racial policies in South Africa, the body continues to be racialised within society and spaces of learning. Miles (1989 cited in Ratele and Shefer 2003, 94) uses the term "racialisation" to denote "a dialectical process by which meaning is attributed to particular features of the body in order to construct difference and legitimise inequality on the basis of 'race'".

During apartheid, the body was inscribed with discourses that still affect the way we categorise bodies today. Certain bodies were inscribed with privilege, while others were denied this privilege. Race was used to create a hierarchy of privilege. In post-apartheid South Africa, those who benefitted and continue to benefit directly or indirectly from this hierarchy should contend with the responsibility of the social capital they gained. Those who still suffer under continuing oppression should search for ways to reaffirm their identities. They should do this without adapting to the societal norms that sought to undermine them (Bignall 2008). The divide between bodies that benefitted from apartheid and bodies that suffered under apartheid creates significantly different experiences.

Difference is primarily emphasised through the racialisation of certain individuals and groups. The ideologies of colonisation and apartheid inform the binaries of this difference. Certain individuals benefit from a university's cultural and economic setting because they are part of a "white supremacy". Subtle alienation and prejudices experienced by those who are not part of this "white supremacy" exist within spaces of learning. This oppression continues because of a lack of awareness of the urgency for transformation. Teaching and learning are often composed without direct or blatant reference to race. Yet teaching and learning practices based on a "white" system hold direct implications for black[2] students. Transformation can therefore be stunted through hidden modes of communication (Jansen 2004, 11).

2 We use "black" here to include all those students who do not fall under the categorisation of white, acknowledging that this categorisation is a direct implication of apartheid laws. Disregarding this categorisation, however, would be to ignore the colossal impact that these laws of categorisation still have in South African society today (Seekings 2008).

Visual arts and "othering"

In the Department of Visual Arts, the outcomes reflected in the University's mission statement (Stellenbosch University 2011) are not effectively realised. These outcomes emphasise respect for diversity and difference. Knowledge applied for the mutual benefit of the community is also emphasised. This mission statement is not practically visible in students' work and the racial representation of the student body. The lack of racial diversity may contribute to the absence of dialogues centred on the complex social and political challenges South Africans face. A correlation can be drawn between the absence of social consciousness and the comfort of privilege that many of the students and staff members experience (Costandius and Rosochacki 2012).

A "blindness" towards difference may also be evident in the Department of Visual Arts. Jansen (2004, 117–128) states that a "colour blind" approach to curriculum is not a solution and that it is used to maintain the status quo of "white" superiority. Lecturers may claim that they "see students and not colour". Jansen (2004, 117–128) critiques this by saying "that is exactly where the problem lies: a lack of consciousness, very often, of the ways in which schools are organized and teaching conveyed that in fact hold direct consequences for learners, identity and transformation".

Prejudice and alienation may be perpetuated by the tradition of Western art. Traditions hold habitually established aesthetic styles that are thought to be appealing and beautiful and contribute to permanent value in a specific culture (Menon 2003). Traditions are recognised by academics, critics and members of the public because of the stability they attribute to cultures. In the past, traditions have been categorised in a teleological way – valuing some cultural traditions above others. In the West these traditions have come to acquire the title "classical". Menon (2003) argues that this has a particular relevance to the arts, because certain styles and disciplines are attributed to the geniuses of a race – the European race. She goes on to say that styles such as painting, music and dance within a Western rhetoric are seen to be "true" standards of artistic genius. Western artistic forms have been used as a foundation on which other artistic modes are judged as inferior (Menon 2003) and arts curricula are dominated by works of Western culture (Giroux 1992). "Othering" may therefore be present in the way artworks are judged and valued.

An example is when a white lecturer is educated in a Western dominated system and shown only Western art as examples of good art. A perception is formed of what is good and when the lecturer evaluates an artwork that is influenced by African art, it could be subconsciously considered of a lesser standard. The students coming into the Visual Arts Department are mostly white students. The students of colour are in the minority and often feel uncomfortable talking and producing work about their own cultural and social experiences. The power dynamic in this instance is emphasised when topics relating to students of colour's social and cultural backgrounds are discussed in class by white lecturers and students. Students in the minority group may feel that they do not have a voice to speak about their own experiences. If there were more students of

colour in each class and they felt like they had the freedom to discuss their experiences and consequently produce work about it, there might be an opportunity to challenge even their white lecturer into reevaluating the lens as well as the gaze from which the lecturer is teaching and evaluating a student’s work.

RESEARCH METHODOLOGY

A qualitative research design was employed for this case study. The social and cultural context of the research problem lends itself to qualitative research, because it focuses primarily on the value of processes and entities that cannot be identified by merely examining or measuring data collected (Denzin and Lincoln 2008). In terms of this design, researchers are required to acknowledge not only their own perspective but also the many voices that emerge during the research process. Researchers should adopt a reflective attitude towards inquiry that aims to gain a holistic understanding of the research subject. Qualitative research is useful for investigating social, educational and political imbalances that will inevitably be present within this particular field of inquiry.

For this study we worked with an interpretative lens, as recommended by Klein and Meyers (1999). An interpretive lens on knowledge requires reflection on how data are socially constructed and a sensitivity to contradictions, interpretations, distortions and biases of the narratives generated (Klein and Meyers 1999). We used a case study research design (Creswell 2003; Denscombe 2003) aimed at exploring and providing an in-depth investigation of “othered” bodies in visual arts spaces of learning.

This research started with a masters study that was conducted by one of the researchers, who is now a PhD student. Further data were collected after the masters research was completed and then four researchers collaboratively worked on the article. Involved in the study were two coloured, one PhD student and one part-time lecturer, and two white, a lecturer and one masters student, researchers. The coloured lecturer studied at the same department for six years and taught for one year, and the white lecturer was teaching at the department for ten years. The PhD student studied at the department for seven years and the masters student for one year.

Purposive sampling was used. Specific students were chosen because of their particular position in the department. This could be considered as bias because it relied on the judgement of the researchers. However, three researchers were involved in the selection which reduced the chance of bias to a certain extent. The original participants were chosen by the masters student and the next phase of interviewees were collaboratively chosen by three of the researchers (two coloured and one white). The reason why we included two coloured persons to make the choice was that they could associate more with feelings of being “othered” in this context and therefore could probably make a better selection. Coloured and white researchers were included to enable more objective analysis of the data.

Data were collected from observation and interviews. From 2012 to 2015, several interviews were conducted with 12 participants from the Department of Visual Arts. The participants, who involved eight students and four lecturers in the Department of Visual Arts at Stellenbosch University, were interviewed in an environment that was "safe" and comfortable. This means that the interviews took place in a quiet environment behind closed doors, where discussions could not be overheard and where participants could speak freely without fear of judgement or victimisation. The safe space provided equal opportunity to voice their opinions, which at times were brutally honest and controversial. The information gathered from the interviews provided in-depth insights into the experiences of the participants, as maintained by Yin (2009).

Two rounds of interviews were conducted. The participants from the initial selection consisted of two black, four coloured and two white students, and one black[3] and three white lecturers. The second round of participants were six students from the first sample. We asked a person from outside the university to do the second round of interviews because we wanted to reduce the bias from the researchers.

Inductive content analysis was utilised for analysing the data. This research approach allows for the identification of patterns and themes within the data collected. All the data were read by the researchers. Themes were compared and then we collaboratively decided what to use. All black and coloured respondents felt that they were "othered" in some way. One white respondent felt sympathy with black and coloured students for being "othered", and the other white participants did not feel that they were "othered". The lens that was used to analyse the data was both how students perceive themselves as "other" and how dominant culture sees them as "other".

FINDINGS AND DISCUSSION OF THE INVESTIGATIONS

In the following section the data from the interviews are presented. It is divided into four different thematic groups. At times participants' responses stretched over more than one theme. It is therefore important to read this section as a whole and to consider the interwoven nature of themes within qualitative research. The themes are governed by an overarching notion of "othering", but are discussed in four different sub-themes, namely symbolic racism, language and culture, economic and social circumstances and, lastly, visual hegemony.

Symbolic racism

In the Department of Visual Arts, racial discrimination can be described as "symbolic racism", as termed by De la Rey and Duncan (2003, 48). While the department does

3 Only one black lecturer was chosen because he is the only lecturer, apart from the researcher, who is black or coloured in the department.

not present explicit racism, indirect racism seems prevalent. Students who are directly affected by this indirect racial discrimination recalled their experiences.

Student S4 remembered the first day at the department as follows:

> …I was looking around and like – Where the hell are all the black people? [laughs] Oh my goodness, did someone get stuck in traffic? What is happening here?…You just know, from that day, I just knew, no one needed to tell me…it's just something is wrong, something is very, very wrong. It's a university, I understand if it's maybe a high school, maybe the parents can't afford to pay or something, but this is a university, where people can get funding. And you often wonder, like I really, really wondered, did I get in here by merit or because they just wanted their numbers to do something? And I am pretty sure it's the second one, like honestly.

Student S3 mentioned the hidden nature of racism:

> But I've never been called the "k" word, but [it] doesn't mean if someone doesn't call you that then they're not racist or whatever. Racism can come in different ways, you know.

Student S5 mentioned that coloured people would usually sit together. She also mentioned that her accent was mocked:

> People will like joke about uhm coloured people's accents and then it's like oh it's fine to joke about it.

Student S5 recounted an incident which demonstrates the symbolic racism involving resentment of redress:

> This girl in my class she, we were talking about the language policy, and she is like "No, this English business is annoying now. You English people, why don't you just go to [name of English university] or something? You knew that this place was upper class. Why do you want to come here…why do you want to come here and change it? Just go to wherever and go tell them, you know, to teach in English or to teach in new languages, but don't come here and tell us to change [from] Afrikaans".

Often racism also has to do with maintaining power. Power, as Student S1 explained it, is about maintaining privilege and comfort.

> They [white students] are comfortable, this is the safe zone for them. It is like home away from home basically. Everything gets done the way that they're use to [it] being done.

Student S1 continued to say that:

> No one will openly say it like "I am a little racist at school, I have been raised that way". Everyone is afraid to say [it]. Let's just be honest about it…for my first year and coming to res[idence], like and you ask me who do I want a room with. I am going to choose a black girl, and I am not even going to lie about that. I am going to, because I am comfortable. But I think people…are just ignorant about it.

This student, S4, highlighted how it feels to be isolated merely by being in the minority:

> Even, I mean I remember when I was attending visual studies class and we were only two black people in my visual studies class…I don’t know what you call it but there is a term for it. That all white people, no one is going to notice when you are not in class, but the two black kids – if you are not in class then they will know that you are not there.

Student S4 also highlighted her discomfort with the content of the courses:

> I mean you’d see all these pictures about slavery…and other things and people would be so, so like, I mean someone laughs here and laughs there and I’m thinking “What if that were my grandfather or something?”…It was not nice being in those classes. I’m just so glad it’s over.

Student S9 mentioned how lecturers were speaking about her and how she didn’t have the power to stand up for herself:

> [T]hey said…something like, aah you know, this one is struggling but it’s to be expected, you know. Maybe she doesn’t come from, blah blah blah or something, but it was something mean. I remember and then, did I say something back at her? No, I just hated her after that.

Language and culture

The culturalisation of racism is often seen through the use of language (De la Rey and Duncan 2003). Since 2016 the language policies of Stellenbosch University have aimed to include English as a medium of instruction. However, the predominance of Afrikaans as a medium of instruction (with interpreting into English) continues to be a source of concern. Language is connected to culture in the South African context. Students’ experiences concerning language and culture relate to discrimination they experienced while studying at the Department of Visual Arts. Coloured students who understand Afrikaans and English could feel less othered in this environment than black students who speak another African language and English. It should be noted that Stellenbosch University aims to develop isiXhosa as a third academic language after Afrikaans and English.

Student S6 talked about the discomfort she experienced while attempting to include a non-Afrikaans-speaking student in a conversation:

> I have seen how other people have been discriminated against. It makes me feel helpless. Like when myself and another [black] student made some enquiries about bursaries together for post-graduate [studies]…So we went to this lady, for me when someone does not understand Afrikaans, then I speak in English, even if the Afrikaans people laugh at me and stuff. For me it is just about the person not understanding you. Why would you continue speaking in Afrikaans and at a fast pace and so?…Then the more I wanted to speak to the lady in English [to accommodate the student with me], the more she spoke in Afrikaans to me.

Student S3 recalled an incident:

> [The lecturer] was talking Afrikaans when he was criticising my work and then I’d say – I’d tell them, like if you’re going to criticise my work then if you do it in English so I can hear you. And then he, he spoke English and then slipped it back to Afrikaans and then I remember me and [name of black student] we left during the crit.

Lecturer L3 recounts an incident during a Student Representative Council (SRC) meeting when a girl asked a question in Xhosa:

> [A]fter she asked the question all of us just started applauding her. We were like; yes make your point about the language issue in Stellenbosch, good for you. And then one of the SRC, white, tall, skinny boy answers her in Xhosa and then the applause was even louder...It was just this moment that I think I will never ever forget and I wish that, that was normal.

This student, S7, related her feelings of disjointedness to her own culture:

> The way she [a lecturer] spoke to me about my project was almost like, ja, she is a coloured and she lives in the coloured community and she knows more about being coloured than I actually do. Which I was quite offended by, because, I mean, I’m in both positions. I’m an outsider and I’m a coloured myself so I can speak for – I can’t speak for [all] coloured people – but I can speak for my community kind of thing. And for her it was just like, ja, she can speak for the coloured people and the coloured community and the academic community all at the same time…
>
> I battled a lot with that project in terms of what coloured identity was all about. I got so frustrated at a time because I was like, being coloured is not about doilies and spices, it’s not.

Lecturer L2 explained that language and communication, in a situation where diversity is present, requires negotiation:

> The language issue for me has always been like, if there’s an area of negotiation, if someone cannot articulate themselves in a certain way then...[we have] to work together and to find ways to communicate. I have my technician who can translate for me in some ways and I have other students who chip in when someone else can’t say anything or doesn’t have the right words to say something. To that extent there is a process of negotiation.

Economic and social circumstances

Socio-economic differences between students become apparent in the Department of Visual Arts. Students who do not have access to extra finances have difficulty completing certain assignments. This has a social impact.

This student, S4, shared her feelings regarding economic challenges:

> There’s…a few individuals who like come from wealthier backgrounds and like obviously their parents will provide. But, for me it’s like, aah, I need to think, you know? Maybe I should budget here a little bit and not be too extreme, so [my economic circumstances] did kinda impact me.

Another student, S3, had this to say:

> Definitely the extra expenses [are] a lot. I think it definitely can stop the [creative] process because you will be working and then all of a sudden you’ll think “Oh, I need to buy paper” and then you kinda think, well let me put it off for another three days until I pluck up courage to ask my parents.

Finally, this student, S7, summed up her attitude towards economic challenges:

> I think that [money] was actually an issue for me, because a lot of the times I couldn’t even buy a bottle of thinners. And I mean, I don’t look down on that, I understand that, you know? My father was the only one who was working in the whole household and it wasn’t even for like millions or whatever…so I understood that asking for money every time for the exhibition was out of the question. And I felt, now looking back on the course, I felt that maybe, if I had more money, I would have gotten higher marks.

Visual hegemony

Discrimination and “othering” can affect students’ creative processes as well as the work they produce.

This student, S2, gave her viewpoint:

> You get this very kinda, similar mindset, where everything is just from their [Afrikaans students’] point of view and then it’s a very Afrikaans point of view. It’s always from a very privileged position, the art that’s made. It’s never this real struggle that people are dealing with – poverty and racial issues – which is so prevalent in our country and then you think, well it’s an art department. We should be talking about these things.

Student S8 explained how diverse spaces of learning may contribute to the teaching and learning experience:

> I‘ve often thought when something like a revolution happened, the only time it was successful was when you threw out a lot of things. It doesn’t feel like anything is being thrown out here in Stellenbosch and to a large extent I think the foundations should be shaken a little bit. We get so used to the system that you become so part of it and so relaxed in your own comfort zone.

Student S3 recalled an incident:

> And I remember when, I think it was me and, me and [name of black student], it was a photography project…I was used to be being, like at the bottom, or being the second from at the bottom, and then from like second year things slowly changed and then…I think it was a seventy for a project, for photographic project and then [name of black student], got like an eighty and that. Giving the credit became an, it became an issue. I remember we had a crit…the guy [name of fellow student] was very, he was very mad like “Why did I get like a seventy?”…so he really felt like I didn’t deserve that seventy and then also…talked about [name of black student], not deserving that mark that she got.

DISCUSSION

The discussion that follows focuses on various issues that arose from the experiences of participants in the Department of Visual Arts of Stellenbosch University. These issues include symbolic racism, language, socio-economic influence, the dominance of Western narratives and the difficulty related to "othering". Symbolic racism results in discomfort for students of colour and stinting of transformation in higher education settings. Transformation is linked to language policies – a contested issue within Stellenbosch University. Language holds political and cultural power. Apart from language, the socio-economic backgrounds of students also influence their ability to produce academic work and create an imbalance of opportunity among students. An imbalance in the representation of themes is evident in students' work. Western discourses dominate and perspectives are often narrow and exclusive. It remains difficult to discuss "othering" in educational settings, because lecturers may assume that their knowledge of the "other" is superior. Critical citizenship and reflective thinking can be used as tools to address these issues within visual arts learning spaces.

Students mentioned that it was uncomfortable to be students of colour in a class that was predominantly white. This discomfort became especially pronounced in situations where colonialism, apartheid and post-colonialism were taught and discussed. Students felt that in these situations their difference was accentuated, which made them feel more "othered". When people are confronted with situations of discomfort, it could be easier to amalgamate to the environment than to confront the discomfort. In the visual arts, expression plays a key role in learning. If freedom of expression is hampered, the learning process is hindered. Students may feel more comfortable voicing their opinions in their academic writing than discussing their opinions and ideas in an everyday scenario. This discomfort inevitably seeps into their artistic process, which is very reliant on an open and confrontational way of working and discussing their ideas. Symbolic racism causes discomfort for students of colour and allows white hegemony to continue.

Academic requirements help to shield previously white universities from radical racial transformation by using merit to award positions for study. Oloyede (2009) argues that educational practices are used in the process of normalising marginalisation because those accepted into universities are often accepted on the basis of their academic prowess. Ideals of progress and control may allow white academics to negate their role in transformation while perpetuating racism. Discourses of merit allow academics to uphold intellect as the chief concern of universities while transformation, social cohesion and racism receive far less attention. Academics may also disregard pressing issues concerning race, because some universities' internal bureaucracies, which favour white supremacy, have been firmly established (Oloyede 2009). Symbolic racism is practised through a denial of the patterns of racial inequalities that are still prevalent in Stellenbosch University's context. It is also revealed through attitudes and actions of resentment regarding the urgent need for redressing patterns of racial inequalities. As

a result, antagonism towards certain demands for removing racism exists (Ratele and Duncan 2003).

Part of the way that Stellenbosch University maintains its position of white supremacy, in an evidently changing demographic landscape, is through language. Language plays a major part in upholding elements of symbolic racism in the Department of Visual Arts. Some instruction and communication with peers and lecturers occur exclusively in Afrikaans, even though the university's new language policies promote dual-medium instruction. In recent years, the university has been obligated to address issues of bilingualism and single-language instruction (in English) due to a large influx of English-speaking students. This has caused an array of debates and problems, because some parents and alumni are adamant on maintaining the key role of Afrikaans in the university's language use. Older generations' strong opinions about language policies often filter down to younger generations of students. Language can become an indicator of social change. It has come to represent where progress is evident or where it is hindered (McKinney 2007).

Language signifies systems of power. Symbolic power denotes a system of power that is seemingly invisible and exercised with the involvement of those who are subjected to it yet are unwilling to acknowledge either their role in its implementation or their powerlessness within it. Systems are therefore utilised to enable and ensure the control of one group over another through tools of communication and knowledge (Bourdieu 1991). Language at the university can be used as an agent of control by those in positions of power. The Afrikaans language is tainted with political undertones, because for many black people it is symbolically related to white Afrikanerdom.

Language can also be an indicator of culture. Language links representation to meaning and culture. The representation of meaning allows us to say something significant about how we present ourselves to the world (Hall 1997). At the Department of Visual Arts the majority of the students and lecturing staff are still predominantly white. Those students and staff members who are in the cultural minority in the Department of Visual Arts may need to negotiate their identities in order to avoid cultural isolation. Language conveys meaning in a system of representation that symbolically evokes broader issues of knowledge and power. Foucault (cited in Hall 1997) points to discourse as the production of knowledge through language. Discourse governs the way in which social practices are constructed. Discourse entails both language and practice (Hall 1997).

Social practices in the Department of Visual Arts such as isolation and "otherness" are not limited to racial, cultural and language issues. They encompass a wider social perspective in which the socio-economic context of students must be taken into consideration. The degrees offered at the Department of Visual Arts require extra expenses. A distinction is made between those who can afford these extra costs and those who find it financially difficult to do so. In effect, financial difficulties also bear consequences for the academic work produced. Unequal economic backgrounds create an unfair playing field. Students who suffer in these conditions are often burdened

with feelings of guilt and shame from continuously asking their parents for money when conditions at home are financially unstable. Imbalances in social and economic circumstances present in the Department of Visual Arts at Stellenbosch University produce a sense of discomfort and pretence.

The focus areas on which students in the Department of Visual Arts choose to concentrate when producing work are of concern. The work produced represents a very narrow worldview. This worldview remains a largely Western one, in which challenging social questions are generally absent. If these issues are addressed, it is often from a very specific perspective that exposes disconnectedness to perspectives outside the students’ context. Approximately half of the students at the Department of Visual Arts come from a white Afrikaner heritage. This heritage is a reoccurring theme often studied and researched. Students are encouraged to study their identities and traditions. Students who do not share this particular heritage are also encouraged to look at their own traditions and culture. Many students, however, do not wish to do so because they feel that if they reveal their differing cultural traditions they will be isolated. Menon (2003) argues that artistic styles within a Western rhetoric are seen to be the idealised standard. This standard is seen as the norm that is used to judge other artistic modes that fall outside this ideological perspective.

As we have mentioned before, students have freedom within their artistic work. Yet work produced in a certain institution is influenced by the main discourses taught there. It is within this setting that we would like to argue the following: Stellenbosch University, and especially the Department of Visual Arts, because of its history, has foundations in European ideals that remain influential. It is very difficult to discuss ideas relating to the “other” in this learning space without being burdened by its position in the South African context. In her seminal work “Can the Subaltern Speak?” Spivak (1985) talks about the representations of historical reality. She highlights that “othering” involves an awareness of power, the production of power and the representation of the subordinate. “Othering” takes power away from those being discussed and researched and allows it to be placed into the oppressors’ hands to further manipulate the way in which the “other” is viewed and written about. Students in the Department of Visual Arts must therefore rely on knowledge brought across to them by intellectuals who have power over the knowledge being produced in the department. Students from cultures other than the dominant culture present in the department find it difficult to speak about their own traditions and backgrounds. This may be due to the way lecturers assume superior knowledge of these “othered” traditions and heritages. Challenging educational contexts could be mediated by critical citizenship education and reflective thinking.

As Johnson and Morris (2010) suggest, reflective thinking involves a holistic understanding of the context in and around the spaces of learning as well as the relationship between the lecturer and student. To address students’ feelings of “otherness”, it becomes necessary for lecturers to promote and facilitate learning that is not tied to political motives, but instead nurtured through an understanding and an adoption of reflectivity. This will enable them to have a better understanding of

the many issues with which students grapple, making it possible to deal with daily complexities that exist within spaces of learning. Combining critical citizenship with reflective thinking enables dialogue between students and lecturers, which is necessary to address issues of "othering" within spaces of learning. This creates a partnership that is vital for pedagogy.

CONCLUSION

Visual Arts departments are normally considered safe spaces of free expression. In this study it became clear that the creation and maintenance of a "safe" and "free" space of learning require deeper investigation in order to understand the complexities involved. "Othering" because of indirect racism, language or economic circumstances can affect students' creative expression even though the spaces of learning are often considered equal and free.

Participants' experiences reveal the challenges that are deeply rooted in the historical and current narratives of the town in which the university is situated. It also highlights some of the many trials students face with regard to reaffirming their identities in a post-apartheid society. It is difficult to articulate the symbolic racism within the department, because a minority experiences it. And often one only becomes aware of it as an afterthought and in hindsight. As one researcher put it:

> You doubt and downplay it as nothing, a mere figment of your imagination. If you call your experience racist you are labelled as too sensitive and calling a race card just for the sake of it. But you feel it, you are always aware of it, you deliberately (well mostly) choose to say and do nothing about it because of the fear of being ridiculed, shamed and causing conflict.

We are of the opinion that addressing the social and economic imbalances within spaces of learning will help address feelings of being "othered" that have been experienced within these spaces. In terms of social and economic circumstances, it is evident from the research that a minority of students experience difficulties. It is our suggestion that, at the start of each project, all students should work with a fixed budget. A suggestion would be that the finances that go towards purchasing materials should be included in the student fees and the same amount should be available to each student at the start of each project. This would not only ensure an equal playing field for students to create work, but would also encourage the development of skills to solve problems creatively through considering materials and working within budget constraints. It may prove to relieve feelings of financial pressure and thereby reduce feelings of being "othered" among students within spaces of learning.

We also suggest that critical citizenship education be expanded within the curriculum at the Department of Visual Arts. It involves processes of critical thinking and critical pedagogy that promote reflective thinking, learning and dialogue. Promoting reflective thinking among lecturers and students would provide lecturers and students with an opportunity better to understand the circumstances in which people find themselves. It

would also encourage a necessary dialogue between lecturers and students. This dialogue could include students’ involvement with creative briefs, surveys and assessment forms that should be filled in by students on a regular basis. Lecturers could become more accessible to students. Students should feel able to voice their opinions freely without fear of the consequences. Improving the dialogue between students and lecturers may enable a relationship founded on a mutual trust necessary for personal growth and growth within post-apartheid spaces of learning.

The data suggest a need for spaces of learning to be more diverse. The implementation of an extended degree programme that allows students from disadvantaged backgrounds an opportunity to enter the degree programme would be a way to address inclusion. A minority of black students does not encourage transformation. We argue that diversity within spaces of learning could contribute to learning experiences that are enriched by knowledge from varying racial backgrounds and perspectives. This would promote a necessary development within the spaces of learning in the Department of Visual Arts of Stellenbosch University.

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Story Sharing in a Digital Space to Counter Othering and Foster Belonging and Curiosity among College Students

Gina Baleria
Sonoma State University, USA

ABSTRACT
The purpose of this exploratory qualitative study was to discover how a single, relational intervention in a digital space focused on civil, respectful conversation across difference might influence digital media literacy (DML) among college students, with the goal of increasing college students' sense of belonging and level of curiosity. The researcher used a phenomenological approach, exploring and describing the lived experiences of students who participated in a micro-engagement with an *other* through interviews (Creswell, 2014). This study investigated the main question: (a) How does a semi-structured, relational micro-intervention focused on civil, respectful conversation across difference influence college students' sense of belonging and level of curiosity? This research was guided by the Framework for Individual Diversity Development (Chavez, Guido-DiBrito, & Mallory, 2003), which provided a theoretical model for the process of moving from lack of awareness and *othering* to awareness and acceptance. Findings that emerged involved students' recognition that a semi-structured micro-intervention with an *other* in a digital space enlightened them to the value of story sharing to navigate differences, find commonality, and establish small-scale relationships. These key findings indicate that the time and structure involved in a relational micro-interventions across difference in a digital space can influence DML, sense of belonging, and level of curiosity.

Keywords: *digital media literacy, micro-intervention, semi-structured, counter-story, belonging, curiosity, relationship, engagement, persistence*

Digital and social media are now ubiquitous for college students (Junco & Cole-Avent, 2008; Moeller, 2010; Roberts, Yaya, & Manolis, 2014), who see their phones and tablets as portals to real spaces in which they engage and carry out various types of relationships, often as an extension of campus, class, friendship, and family. This is particularly true at community colleges (CC), where students may be attending remotely or commuting. However, research has indicated that students have not been taught the digital media literacy (DML) skills to navigate these spaces, assess and decipher messages (Kahne & Bowyer, 2016; Kim & Yang, 2016; McGrew, Breakstone, Ortega, Smith, & Wineburg, 2018; Simsek & Simsek, 2013); and communicate and engage in ways that are productive, respectful, and empathetic (Park, Kim, & Na, 2014).

For the purposes of this research, DML is defined as a set of skills that prepares and empowers students to assess and critique information online, challenge and change messages they hear, and engage more respectfully with others (Martens & Hobbs, 2015), critical building blocks of engagement and belonging. A lack of DML can lead to students *othering* or being *othered* in digital spaces. *Othering* is when one develops an us–versus–them mentality and then excludes, often via marginalization of (Young, 1990) or lack of curiosity about those considered *them* (Johnson et al., 2004). When students feel *othered* or marginalized, their feelings of belonging decrease—negatively impacting campus climate, engagement, and ultimately persistence, retention, and success (Hausmann, Schofield, & Woods, 2007; Masika & Jones, 2015; O'Keeffe, 2013). Ultimately, *othering* can impact societal discourse and democracy.

This study explored how a semi-structured micro-intervention involving engagement across one or more salient social and/or political differences in a digital space influenced belonging and curiosity among students at a Northern California CC. Belonging and curiosity are two factors that influence desire and openness to engage (Buote et al., 2007; Hausmann et al., 2007; Hulme, Green, & Ladd, 2013; Locks, Hurtado, Bowman, & Oseguera, 2008; Masika & Jones, 2015; O'Keeffe, 2013), making them foundational elements for the teaching of DML. This study investigated the main question: (a) How does a semi-structured, relational micro-intervention focused on civil, respectful conversation across difference in a digital space influence college students' sense of belonging and level of curiosity?

This study was conducted using CC students, because of the challenges involved in student persistence, retention, and success at CCs. Less than half of all California CC students (48%) transfer or complete a certificate or Associate's degree within six years of initial enrollment. For students from marginalized backgrounds, the numbers are even more concerning: 40.8% after six years (California Community Colleges Key Facts, 2016). This study focused on both historically marginalized and historically privileged students, because all groups must learn how to communicate and listen to each other to build understanding and create a climate in which everyone feels a sense of belonging, curiosity about the other, and safe when engaging in a relationship across difference. DML skills are integral to this process. As Freire said, literacy is not just about reading the word, but also the world (Freire & Macedo, 1987). Today, reading the world requires understanding how to "read" cues and content in digital spaces, as well as across cultures and difference (Betancourt, Green, & Carillo, 2003).

This research has taken on particular significance in the wake of the 2016 presidential election and the growing consensus that Americans perceive the nation as divided (Enter the Electome 2016; Suh, 2014). Strategies and tools to bridge divides, combat *othering*, and teach people how to engage and build relationships with others who are different are critical to combating this problem (DiMaggio & Garip, 2012; Hurtado & Ponjuan, 2005; Locks et al., 2008; Mendoza-Denton & Page-Gould, 2008). College students are in a position to influence the direction of their communities and society. Therefore, it is imperative that we provide them opportunities to develop the DML skills necessary to navigate digital and social

media spaces and engage and build relationships with those who are different from them (Hall, Cabrera, & Milem, 2010).

THEORETICAL FRAMEWORK

Research indicates that a conscious approach to opposing and reducing *otherness* by fostering connection and relationship building may be effective (Bennett, 1993; Chavez, Guido-DiBrito, & Mallory, 2003). The theoretical framework that guided this study frames the process for moving from *othering* and lack of curiosity to awareness and acceptance (Chavez et al., 2003). The process it describes applies to students' experiences as they engage in a semi-structured relational micro-intervention across difference in a digital space. Chavez et al. (2003) noted that "consciously searching for at least one commonality may be the first bridge toward valuing and validating *others*" (p. 466). This suggests that a relational semi-structured micro-intervention might be effective in helping students move along the spectrum depicted in Figure 1 by gaining exposure to those who are different from them. As Chavez et al. (2003) noted, "Once individuals accept the possibility of relativism, it is difficult—if not impossible—to retreat to dualism" (p. 461). Given that this process can be fraught with challenges, including fear of letting go of a previous mindset, guilt over betraying people who taught previous beliefs and practices, and uncertainty about how to engage with people who are different, it is critical that community college leaders provide guidance and structure to students in such a process.

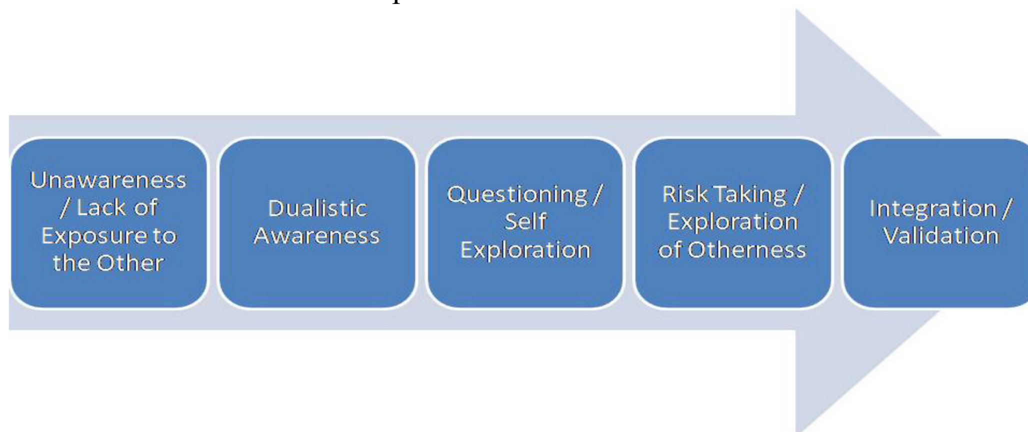

Figure 1. Theoretical framework of moving from othering to acceptance. Adapted from "Learning to Value the Other: A Framework of Individual Diversity Development," by A. F. Chavez, F. Guido-DiBrito, and S. L. Mallory, 2003, *Journal of College Student Development, 44*(4), p. 459. Copyright 2003 by American College Personnel Association—College Student Educators Intl.

This framework enabled the assessment of significance and meaning in student experiences and responses, and it provided clues for whether an engagement across difference may influence student curiosity and sense of

belonging through the experience of engaging in a positive small-scale relationship across difference.

LITERATURE REVIEW

Given the growing body of research on the ubiquitous nature of digital media to students' lives (Junco & Cole-Avent, 2008; Moeller, 2010; Roberts et al., 2014), as well as student's dependence on digital media for engagement (Kim, Wang, & Oh, 2016; Moeller, 2010), it is important to explore how students are engaging and pursue the fostering of belonging, curiosity, and DML. This literature review examines the research on DML and engagement; how micro-interventions can influence belonging, curiosity, and attainment; and how relationships intersect with engagement, belonging, and curiosity.

Digital Media Literacy

Several studies establish the ubiquitous nature of digital media to the lives of today's college students and students' dependence on digital media tools for engagement (Junco & Cole-Avent, 2008; Moeller, 2010; Roberts et al., 2014). Students consider mobile devices as critical to maintaining relationships and conducting everyday tasks (Kim et al., 2016) and consider a day without their mobile device as a day without access to relationships with friends and family (Moeller, 2010). Students who attend commuter schools or take online courses rely on digital spaces to connect with professors and peers, complete assignments, and stay current on college activities and information. Several studies suggest that digital media use can facilitate engagement, rather than inhibit it (Enjolras, Steen-Johnsen, & Wollebaek, 2013; Gil de Zuniga, 2012; Kim et al., 2016). DML education has been correlated with increased political engagement online and a greater exposure to diverse perspectives (Kahne, Lee, & Feezell, 2012; Kim & Yang, 2016; Mihailidis & Thevenin, 2013). Engagement in online communities has been linked to student attainment (Fagioli, Rios-Aguilar, & Deil-Amen, 2015), and research has shown that social media may allow students to forge connections with more diverse *others* and develop stronger relationships than they would in a traditional class setting (Junco & Cole-Avent, 2008). Digital media may also allow students who don't feel comfortable speaking in class to engage more meaningfully in course discussions (Junco & Cole-Avent, 2008).

However, though today's college students are considered digital natives who have grown up engaging with digital media, many do not have well developed DML skills, including networked individualism, the ability to develop and maintain relationships in digital spaces (Park et al., 2014), a necessary skill set for a vibrant participatory democracy (Simsek & Simsek, 2013). Research finds that guidance is necessary to help students hone their DML skills (Hargittai, Fullerton, Menchen-Trevino, & Thomas, 2010; Kahne & Bowyer, 2016; McGrew et al., 2018).

In addition, many students who engage online may find themselves marginalized or marginalizing others through cyber-bullying and gossip (Smith, Mahdavi, Carvalho, Fisher, Russell, & Tippett, 2008). Instead of improving engagement and relationships, online communication may silence dissenting voices, often among people who are marginalized and *othered* (Smith et al., 2008),

further excluding those outside the mainstream. Research also finds that people are not engaging meaningfully with those outside their social or political circle—the *other*—on issues impacting their community or affecting democracy (Kahne & Bowyer, 2016; Enter the Electome, 2016). The deliberate and conscious teaching of DML skills can help address this challenge.

Micro Interventions

Micro-interventions are an emerging area of research with the promise that small, scalable interventions designed to address significant problems can result in positive outcomes (Walton & Cohen, 2011; Walton, Logel, Peach, Spencer, & Zanna, 2015). Longitudinal experimental research studies on Black and female college students show that micro-interventions can close opportunity gaps, improve health outcomes, and increase belonging (Walton & Cohen, 2011; Walton et al., 2015). To test the influence of a small intervention on belonging, health, and academic outcomes of Black (N=49) and White (N=43) college students, Walton and Cohen (2011) conducted a quantitative, longitudinal, experimental study involving a brief intervention at the beginning of freshman year defining social adversity as normal and short-lived, and a measurement three years later. Researchers found that grade point averages (GPA) of all students in the treatment group rose (Black, p=.0007; White, p=.014), and the gap between White and Black students closed 79%. This did not occur in the control group. Black students in the treatment group also reported fewer doctor visits (28%) than those in the control group (60%), eliminating the race gap in self-reported health. Positive outcomes were also seen in a randomized, controlled, longitudinal study using a belonging micro-intervention with female engineering students in a male-dominated major at an elite university (Walton et al., 2015). The GPAs of female students (N=92) in the experimental group increased, erasing the gender gap with male classmates (N=136). Implications are that small interventions can have large and lasting effects on the success and well-being of historically marginalized student groups. Micro-intervention research has also shown promise in stress reduction (Smyth & Heron, 2016), coping mechanisms for post-traumatic stress disorder (Itzhaky & Dekel, 2005), parenting and childhood obesity (Ayala et al., 2010), mobile app use (Smyth & Heron, 2016), psychological capital (Luthans, Luthans, & Avey, 2014), transportation (Caminha, Furtado, Pinheiro, & Silva, 2016), and organizational behavior (Nelson & Cooper, 2007). Researchers note that micro-interventions are scalable, easy to implement, and effectively paired with semi-structured approaches (Itzhaky & Dekel, 2005; Smyth & Heron, 2016).

Relationships

Engagement, belonging, and curiosity are foundational elements of relationship building (Buote et al., 2007; Shook & Clay, 2012; Smith & Schonfeld, 2000). However, previous research has generally framed relationships as sustained interactions among individuals (Hammer, 1983). Research is well established on the importance of sustained relationships to social well being (O'Neal, Mancini, & Degraff, 2016), health outcomes (Lieberman, 2013), and community health (Bruhn, 2004). Research is lacking as to the influence and significance of relationships that

may not sustain. These small-scale relationships are foundational to the fabric of a community, including online communities, and may involve one small or short interaction with an individual, such as a micro-aggression (Pierce, 1970) or micro-inclusion (Aguilar, Walton, & Weiman, 2014), small interactions that can have large negative or positive impacts. It is important to explore the impact of small-scale relationships, because they are ubiquitous to people's everyday lives and can reverberate throughout society.

Research exploring the cultivation of small-scale relationships across difference in a digital space can fill gaps in the literature. Small-scale relationships involving story sharing—narrative and counter-narrative (Delgado, 1989; Solórzano & Yosso, 2002)—can influence belonging, curiosity, and DML by empowering marginalized students and enlightening the privileged (Delgado, 1989; Ladson-Billings & Tate, 1995). This study fills gaps in the literature by focusing on a relational micro-intervention across difference involving small-scale relationship building through story sharing.

Belonging

Research has established that cultivating belonging can lead to increased student engagement and positively impact persistence, retention, and success (Hausmann et al., 2007; Masika & Jones, 2015; O'Keeffe, 2013). This is especially true for non-traditional or marginalized students (Hausmann et al., 2007). Here, belonging is defined as a student feeling a valued, included, accepted member of the campus community (Hausmann et al., 2007; Masika & Jones, 2015). Several studies have illuminated the importance of campus connections and relationships on student sense of belonging and level of campus engagement (Bonet & Walters, 2016; Masika & Jones, 2015), reinforcing how critical it is to make belonging a structural part of any approach to student integration on campus.

Curiosity

Another factor shown to foster engagement, relationship building, and student success is curiosity, defined as "a willingness to explore the unknown, embrace novelty, and accept uncertainty" (Mather & Hulme, 2013). Several studies establish curiosity's role in student engagement (Buote et al., 2007; Hulme et al., 2013; Locks et al., 2008) and success (Shook & Clay, 2012). Given that curiosity can be developed through uncertainty and unpredictability (Silvia, 2008), and that curious students perceive difficulties as opportunities (Mather & Hulme, 2013), research that places students into a controlled situation involving uncertainty and unpredictability and defines the situation as an opportunity may help foster curiosity, which can in turn help students engage and build relationships across difference.

Engagement with Diverse *Others*

An area of engagement with particular influence on belonging, curiosity, and persistence is engagement with diverse *others*. Several studies establish that students who build relationships with those different from them—or *other*—increase sense of belonging, curiosity, and intent to persist (Buote et al., 2007;

Hausmann et al., 2007; Shook & Clay, 2012). Positive outcomes are seen for both marginalized and privileged students (Buote et al., 2007; Hausmann et al., 2007). Interaction with diverse *others* early in college can also shatter stereotypes, decrease prejudice, increase understanding, strengthen student satisfaction, and improve cognitive learning outcomes (Smith & Schonfeld, 2000). Research indicates that such engagement is a learned behavior (Hall et al., 2010). Therefore, interventions, such as a relational micro-intervention across difference, may be best implemented by community college administrators, faculty, or staff, who can provide students with support, guidance and instruction.

METHODOLOGY

This exploratory, phenomenological qualitative study, focused on learning what participating students had to say about their experiences engaging in a single, relational, semi-structured micro-intervention across difference in a digital space. Careful attention was given to what students reported thinking, the way they described their experience, how they applied meaning to it, and the potential implications for belonging and curiosity. In keeping with the principles of phenomenological qualitative research, in which the intent is to elucidate a particular phenomenon and not to generalize (Creswell, 2014), a targeted purposive sample was used (Creswell, 2014). The intent was to explore an intervention focused on civility and respectful conversation across difference that had not been researched. Strauss and Corbin's (1998) assertion that qualitative research methods can be effectively employed to improve understanding of a practice about which not much is known is applicable in this case.

Participation and Sampling

The 16 students who participated in this study represented a sub-set of 52 students from a Northern California community college who participated in a larger study on engagement across difference. Of the 52, a random sample of 34 engaged in a digital micro-intervention across difference with other students from a two-year college in the Appalachian Region, and 18 served as a control group for the larger study. Of the 34 who engaged in the micro-intervention, 16 were selected to participate in this exploratory study. Purposive sampling was used because the goal of this study was to come to a deep understanding of the groups' experiences, and a random sample was not appropriate, desirable, nor feasible from a methodological or practical perspective (Miles, Huberman, & Saldaña, 2014). This purposive sample may provide insights into larger student populations and avenues for further study.

The 16 students who participated in this study represent a diverse cross-section of the student population on this campus; 40% identified as non-White, in alignment with college and area demographics. However, many students who identified as White were marginalized and *othered* for sexual identity and orientation, first gen status, and socio-economic status (SES). Many held jobs and attended school only part-time, lived at home to save money, and passed on opportunities to begin college at four-year institutions because of cost concerns.

See Table 1 for an overview of study participant demographics. Each student has been given a pseudonym to protect anonymity.

Table 1.
Study Participant Demographics

Student (pseudonym)	Ethnicity	Generation	Year	Orientation
Angela	Mixed	1st Gen	Jr	Bi/Pan/Poly
Angelica	Latina	1st Gen w/ single parent	Soph	Straight
Bella	Mixed	1st Gen	Soph	Straight
Ben	Mixed	Non-1st Gen	Frosh	Straight
Kathy	White	1st Gen	Jr	Straight
Kristina	White	1st Gen	Sr	Straight
Maria	Mixed	1st Gen w/ single parent	Frosh	Bi/Pan/Poly
May	Asian	Non-1st Gen	Soph	Straight
Michael	White	Non-1st Gen	Frosh	Gay/Lesbian
Omar	Mixed	1st Gen	Soph	Straight
Rico	Latino	1st Gen	Frosh	Gay/Lesbian
Rochelle	White	Non-1st Gen	Soph	Straight
Sam	White	1st Gen	Soph	Straight
Sarah	White	Non-1st Gen	Soph	Straight
Shawntel	Black	1st Gen w/ single parent	Jr	Straight
Tommy	White	1st Gen	Soph	Straight

Note: Data adapted from "California Community Colleges Key Facts" (2016). Retrieved from http://californiacommunitycolleges.cccco.edu/PolicyInAction/KeyFacts.aspx

Data Collection

Data were collected from qualitative interviews with 16 students who engaged in the semi-structured micro-intervention with someone considered their *other*. Interviews were conducted in June and July 2017, after the conclusion of the spring 2017 semester and after grades were submitted to ensure that students did not feel pressure to participate or respond in a certain way.

Micro-interventions took place on Mismatch.org, an online portal developed by the researcher in collaboration with the nonprofit organizations Civity and AllSides for Schools. The goal was to match people with an *other* and guide them through a 45–60 minute semi-structured video engagement across a socially salient difference. *Otherness* was determined based on factors gleaned from a pre-engagement survey completed as part of the matching process, including SES, ethnicity and race, age, political leaning, gender, and sexual orientation. Creswell (2014) explained that qualitative and quantitative research often lay on a continuum and sometimes involve the use of opposing data collection methods for various reasons, including for use as screening tools.

Data Analysis

All interviews were audio recorded and transcribed verbatim. The first round of coding involved a comprehensive, systematic content analysis of each

interview, utilizing emergent coding, including in vivo (Charmaz, 2002), descriptive, emotion and process (Charmaz, 2002; Strauss & Corbin, 1998). The second round of coding utilized sub-coding, pattern coding, and structural coding (Miles et al., 2014). This helped in the identification of larger themes that shed light on the significance of the research and identify outliers.

FINDINGS

Key findings that emerged from the data involved the importance of story and counter-story sharing to fostering belonging, curiosity, and DML. Story sharing is a key component of the semi-structured conversation guide (Appendix A), including the allocation of time to share stories as a foundation of the relational micro-intervention. Sub-findings are: (a) the role of story sharing in building rapport and relationship, (b) the influence of taking time to share stories, and (c) the importance of structure.

The Role of Story Sharing and Time in Building Rapport and Relationship

One trend that emerged from the data was that students said they found meaningful connection and commonality with their partner through the sharing of stories and counter-stories. Connection and commonality are foundations of relationship building and can encourage sense of belonging and increase level of curiosity. This was true whether students approached the engagement with a wary attitude, excitement, or indifference. Three-fourths of the students interviewed said story and counter-story sharing not only helped them find connection with their *other*, it also led to greater respect and empathy and the building of a small-scale relationship. In addition to fostering belonging and curiosity, the act of story sharing, as structured into the conversation guide, can improve DML.

Sarah, who returned to college after having children, was paired with a Russian student who had moved to the U.S. as a teen. She said her paired partner "had a completely different background than I did, and yet we found more similarities than differences, and the differences really didn't seem to matter, you know?" When asked why their differences didn't matter, Sarah relayed a story that her partner, an immigrant to the U.S., shared with her. He works as an aide at a hospital, and Sarah described that in his work setting,

> You really have to accept people the way they are. If someone comes in and you disagree with their religion or their politics or their lifestyle, it doesn't matter. You help them. And, it really bothers him when he hears some of the nurses judging patients.… That was not a generosity that I was expecting. It's not what I usually expect from people.… It made me feel really good, like there are good people in the world. Yay! We had a lot of fun connecting over that and the importance of taking people where they are, and the value of every person.

Rochelle, a straight white student who chose two-year college over four-year college because of finances, explained that story sharing helped her and her

partner build connection and achieve a natural conversation. This led to Rochelle's partner feeling enough of a sense of belonging to share a personal story with her, which Rochelle said helped her connect more fully.

> They opened up to me a little bit and told me things that I would never expect to find out about them.… I was like, I feel very privileged that you're sharing that with me, because I wouldn't expect you to open up to me that fast. But after that, I kind of felt more comfortable talking to the person.

In Rochelle's case, the effects of story sharing went beyond her micro-intervention, as revealed when she acknowledged that her partner's willingness to share his story led her to consider that maybe others she had *othered* based on differences might also be more similar to her than she thought, piquing her curiosity about people she considered different from her.

Omar, a mixed-race student of Muslim and Mormon parents, also recognized that he and his partner were different but expressed excitement about the conversation and his growing feelings of belonging and curiosity, based on the stories they shared with each other that revealed their similarities. In his words:

> She grew up Christian, and now she's Christian, but she doesn't raise her kids Christian per se. She doesn't like force it on them… and, I was like the total opposite, because I had Islam and Mormon forced on me…. So, it was enlightening to me [that] she wasn't doing that, and she understood people have their own choices, and people make their own decisions, especially for her own kids. That was pretty cool.

Once Omar and his partner established rapport and connection through story and counter-story sharing, they began to feel accepted by each other, increasing sense of belonging. As they began to build their relationship, their curiosity about each other grew, and they sought and discovered more commonalities.

> I found out she was a [CC] student, as well…, and she was just applying for a bunch of student loans, so we kind of connected on that, because she was one step ahead of me, because I'll be applying for student loans soon enough, and so that was kind of cool… I think we bonded most about college, just, you know, how expensive it is or how people expect someone to be able to afford housing and work and things like that.

This connection and relational foundation also helped foster DML, allowing Omar and his partner to discuss their differing political views with respect and discover further commonality and connection.

> She had a lot of views that were similar to mine, which was surprising because she was 14 years older than me; she had kids; just farther along in life; and she was a Republican, but like we had all the same views. She—(whispers) she had a pot plant in her backyard, which I—honestly, I

> didn't even want to bring up marijuana to her, because I thought she was like—I don't know what she would've thought, because she knows I'm from California. And, she even told me that she profiled me when she saw me, saying that I looked like I smoked (laughter).

Kathy, a White student who defined herself as conservative, straight, and introverted, was paired with someone who, on paper, was very different—extroverted, progressive, Black, and bisexual. Kathy said she expected to be *othered*. Though Kathy and her partner recognized their differences, they bonded over the commonalities they discovered while sharing stories and counter-stories about how they were treated in their communities, increasing sense of belonging. In addition, this story sharing enabled Kathy to empathize with her partner, an important component of DML in engagement. As Kathy described:

> In her class, the students around her yelled out, 'effing n-----. Shut up, n-----.' And, the teacher didn't do anything to stop it. And, she said that people in her town tell her that she shouldn't exist because she's Black.… Obviously, that's unthinkable.… I have never even heard someone use that word besides maybe a Black person.… Other than that, I would never even think about having that word said in a derogatory way, let alone in a classroom with no—like they didn't get in trouble. There was no backlash to using the word.

Kathy explained that she related to this story, even though she admitted that she has never felt unsafe when challenged on her views. Given this, Kathy said she felt a kinship with her partner, because Kathy also felt politically *othered* as a conservative in a progressive community.

Once connection and rapport were established as a foundation for belonging, Kathy and her paired partner continued to build their relationship via their growing curiosity by discussing political issues, discovering agreement on issues such as gun control, gay marriage, and undocumented immigrants paying taxes. Kathy said they were both surprised, because the views on which they agreed are generally ascribed to one political party or another. As she explained,

> I said, 'do you think that illegal immigrants should pay taxes?' [She said] 'Oh, yeah, they should.… and if they commit a crime, they shouldn't be here'… and I was like, 'you know if you said that here, you'd probably be considered a Republican, right?' She was like, 'oh, wow. I didn't think that.' Then she brought up the Second Amendment and creating restrictions and having a mental capacity test done. And I was like, 'yeah, that's completely reasonable. I think that would be a great thing'.

Kathy expressed that her experience sharing stories and counter-stories and exploring issues with someone who, on paper, was so different was, in her words,

> very valuable and made me take away a little bit of the weight that people held over me in terms of my beliefs and politics, because hearing what she had to say kind of made me feel like, why should anyone hate me.… I felt a lot of the same things as she did, because I'm very moderate in my leaning. I wouldn't even [say] I'm on the right side. I just think I lean right.… So, it definitely just made me take other people's opinions with more of a grain of salt.

Kristina—a progressive, mature woman paired with a young, conservative male military veteran—also discovered similarities amongst difference through story and counter-story sharing. These similarities helped her find empathy for her partner and made her more curious to explore his story. As she explained,

> We had like similar situations with family and raising kids, and he was wanting to start a business, but he was in his practical job. So, we both could relate to that, you know, being in, like, well this is our fun thing that we want to do, and this is our jobbie-job that we have to do. And, so we both had that.

Later, when Kristina's partner shared his experiences in the military and that he "had a problem with Muslims," Kristina said the commonalities previously established via story sharing and rapport building helped her try to see his perspective, rather than judge him, as she might have if she had heard his comments in isolation.

> I sympathized with him, saying, 'oh, yeah, it sounds like you were really scared.' Then, that made me think, okay, maybe people that think that we need to have a ban or something are coming from the idea of they're really scared.

This was a perspective Kristina had not considered before. Therefore, without agreeing or validating his need to *other* an entire group of people, she was able to acknowledge him and offer empathy, practicing DML skills.

In addition to acknowledging and offering empathy, Kristina was able to share a story to help moderate the significant ideological divide between her and her paired partner. "I told him the story of how my brother went there (to Iraq). He's done three tours.… He had translators, and he would befriend Muslims and thought they were awesome." Kristina's choice to share that her brother also served allowed her to find commonality and build connection with partner without needing to agree with him, the essence of DML in engagement.

The Influence of Taking Time to Share Stories

An important aspect of finding commonality across difference through story and counter-story sharing involves taking time to share and listen to stories and counter-stories, an important component of DML and the fostering of belonging and curiosity.

Several students mentioned the construct of time, saying that the time they spent sharing stories and getting to know each other helped forge connection, establish rapport, and reveal commonality. This is illustrated by Tommy, who said, "time getting to know each other helped us more easily find common ground." Because they took time to share stories and get to know each other, Tommy discovered that he and a paired partner had sports in common. He plays football for the school, and his partner was a basketball player. In his words:

> She played basketball at the school.… That was probably the best part, going sort of away from the questions for a second, we actually got a better understanding of each other, because we actually got to know each other…. So, when we actually got to the actual questions, we would feel more comfortable asking… and answering those questions with each other.

Time spent in the micro-intervention (30–60 minutes) sharing and listening to stories and counter-stories led many students to challenge their preconceived notions, thus fostering curiosity. Rochelle said differences between her and her partner became less important as the conversation continued, explaining:

> Just being able to talk like we're regular people instead of having this super awkward stranger wall between us, I was really surprised at how easy it was to open up to this person, which was interesting. I expected it to be very like formatted, and the whole time to be looking at the sheet, and we did reference the sheet, but it wasn't the entire time, like, 'oh, what's next?' It was kind of after a while the ability to just have a continuous conversation.

Kristina attributed the time she and her *other* spent sharing stories to being able to treat each other with respect and empathy when differences did arise.

The Importance of Structure

Emerging from the data were findings related to the importance of imposing a structure, in this case a semi-structured guide, on a relational micro-intervention across difference. Bella, who said she had trouble making connections with people, articulated throughout her interview that she appreciated the semi-structured engagement across difference, because it provided an experience she could not cultivate on her own. Ben, a straight, mixed-race male who came to the CC directly from high school, said sticking to some sort of structure or guide helped him have a strong conversation with his partner. He explained, "I went through some of the questions—like what do you like to do in life? Why do you like to do it? I kind of tried to stick to non-political things, and that seemed to work." Tommy said they glanced at the guide to begin their conversation, but then they did not look at the guide for a while as they shared, connected, and built rapport. As he described,

> The first 25 minutes of the conference… we were still getting to know each other. [Then], nobody had any more say. But, it wasn't an awkward silence.

It was kind of a comfortable silence in the sense that that was the point where… we went right into it. Nothing changed.

Tommy reported that they did not stay on topic, which he thought was positive, and which was in line with the study's overall semi-structured design. In this off-topic time, Tommy said they discovered many connections, including college experience, sports, weather, and what they do in their free time. In his words:

> It was really cool. I won't lie—we got a little off topic. We had actually a really good, probably 20–25-minute conversation… of us talking and comparing our areas, classes…, what do we do on weekends, how's the weather, like the seasons. … We would kind of get on tangents and talking about lots of things.… That was really interesting to see how we all matched up in the same study but from a completely different subject.

Because they spent so much time getting to know each other, Tommy said the resulting conversation felt natural and familiar, an indication that everyone felt a sense of belonging in the digital space.

> The common ground sort of found itself, in a sense. Everything we talked about [everyone] was so respectful and listening.… That created common ground.… We had common ground before we even started talking, because of the 20-minute period we had getting to know each other first.

In another instance of authentic connection during time away from the conversation guide, Maria, a mixed-race Filipino LGBTQ+ student, expressed that she got so caught up in the experience of making what she considered a new online friend that she either did not stop to think about differences or found the differences positive. In her words:

> I forget that people have accents in America. So, I thought it was super cute. Just like, oh my gosh, she sounds so nice.… We just talked and talked about what we like and stuff. It felt like a speed date type thing—like just get in and get to know each other like really fast. It was just really nice.

Kathy and her paired partner started off on the defensive with each other, as is revealed in the below exchange. However, the semi-structured conversation guide helped them move from a defensive stance to connection across their differences, leading them both to feel a sense of belonging and become more curious about each other.

> When we started talking, you could tell that she went into it pretty defensive, and I wasn't even going to say anything, because I'm not willing to push on those sorts of topics. [Researcher: Would you say that you might have been

> slightly defensive, too?] No, I'm not defensive at all when it's someone who actually listens (said slightly defensively).

Even though Kathy and her partner were guarded at the beginning, they did find common ground as they talked and shared using the semi-structured conversation guide. By the end of the conversation, Kathy revealed that she had learned from her partner.

One student, May, strayed from the conversation guide, instead "going down the list" of issues from a survey, rather than focusing on the relationship prompts from the guide. As May stated,

> In the beginning, we were both sort of awkward. Like, how do we start this? What are we supposed to talk about? … Finally, I was like, 'okay, I'm going to put up the questions that she gave us that we can like use to ask each other. So, we sort of ran through those, and it was like really awkward. We're just like, 'okay. Name. Age. This. That.' Then, after that, we brought up the social issues…, and ran through those. And, it was a pretty lackluster experience… I mean, I think it was hard to get a genuine conversation flowing, since we sort of felt like there were just these requirements we have to go through, like check the checklist….
> <u>Researcher</u>: So, the conversation guide would have, like tell me a story about this or that. Did you do any of that?
> <u>May</u>: No, I don't think so. I don't remember doing that.

While May's conversation did yield some interesting data, failing to follow the semi-structured conversation guide led May and her partner to struggle, indicating that fostering DML, belonging, and curiosity may require some guidance.

DISCUSSION

Findings reveal the influence of story and counter-story sharing on sense of belonging, level of curiosity, and DML of the students who were interviewed. The foundational action of sharing and listening to stories and counter-stories led to more rich or nuanced conversations and connections among students and their *others*, laying the foundation for the forging of small-scale relationships and the development of curiosity and a sense of belonging, critical aspects of DML and foundational to educational persistence, retention, and success. The parameters of time and structure also played a role.

Students who shared and listened to stories and counter-stories reported positive experiences in the micro-intervention, rapport and recognition, and connection and relationship with their *other* during, and sometimes following, the conversation. These findings are consistent with research on the power of narrative, including story and counter- story to empower students, create meaning, challenge myths, and help students share knowledge and connect across difference (Delgado, 1989), in particular when the story runs counter to the dominant narrative

(Solórzano & Yosso, 2002). Critical Race Theory (CRT) establishes the positionality of one story as counter-narrative to the multiple stories in a dominant, mainstream narrative, which have been told multiple times and repeated over time (Ladson-Billings & Tate, 1995; Solórzano & Yosso, 2002). In many cultures, story sharing is seen as knowledge sharing (Bernal & Villalpando, 2002). In this framework, students who engage in a relational micro-intervention across difference engage in knowledge sharing as they share and listen to each other's stories, which can foster belonging and curiosity as students learn about each other.

Findings related to story and counter-story sharing are also consistent with DML in engagement (Park et al., 2014). Enabling students to move past stereotypes can help them connect with more nuanced and diverse information and *others* (Junco & Cole-Avent, 2008), rather than remain in filter bubbles and echo chambers (Kahne & Bowyer, 2016; Enter the Electome, 2016). Exposing students to diverse perspectives, as is done in a semi-structured micro-intervention across difference, is a key element of DML education (Kahne et al., 2012; Kim & Yang, 2016; Mihailidis & Thevenin, 2013), facilitating digital engagement (Enjolras et al., 2013; Gil de Zuniga, 2012; Kim et al., 2016), and enabling students to be more productive stewards of participatory democracy (Simsek & Simsek, 2013). This finding is supported by the study's framework (Chavez et al., 2003), given the significance of moving from dualism to relativism on the ability to see *others* as fully formed people, rather than a collection of stereotypes.

Related is the construct of time taken to share and listen to stories. Though a micro-intervention is, by design, a small, short, one-time intervention, time played a significant role in students' experiences and feelings of connection with their paired partners. Students who spent time engaging in the initial relational section of the semi-structured conversation guide reported discovering commonality and connection. As mentioned above, the student who did not take the time at the beginning of the micro-intervention to share stories with her partner had a lackluster experience. The pivotal role of structure—specifically the relational semi-structured engagement guide—in students' experiences with the micro-intervention was notable, including the richness and nuance of conversations across difference and mitigating students' perceptions of their *others* toward commonality, rapport, and connection—i.e. relationship. This is a potentially important finding, because it suggests that some level of instruction or guidance is necessary to teach students how to engage across difference, which aligns with existing research showing that engagement with diverse peers is a learned behavior (Hall et al., 2010) and that guidance is necessary to help students hone DML skills (Hargittai et al., 2010; Kahne & Bowyer, 2016) and increase sense of belonging and level of curiosity.

Structure also emerged as a key finding influencing students' experiences engaging in the semi-structured micro-intervention across difference. Several examples emerged from students' interviews related to the influence of the semi-structured design on their experience, including Kathy, who began on the defensive with her partner but found connection through and in spite of initial defensiveness, because she and her *other* followed the conversation guide, shared stories, built rapport, established trust, and found commonality across difference. This helped foster their feelings of belonging and curiosity toward each other.

Another potentially significant finding related to the importance of structure is that several students brushed past differences to focus on commonality. Though students acknowledged difference, they tended to minimize it as less important than the similarities they discovered sharing stories as outlined in the guide, even though in many contexts, these differences are often seen as paramount and represent dividing lines in our socio-political landscape. This suggests that it is possible to guide students who are different to connection and foster belonging and curiosity through the use of a semi-structured design, providing hope that semi-structured, relational micro-interventions across difference could foster curiosity about *others* and increase sense of belonging, laying the groundwork for improved DML.

Limitations and Recommendations for Further Study

This research was exploratory in nature. It provided a compelling snapshot of how a semi-structured, relational micro-intervention across difference in a digital space can influence college students' sense of belonging, level of curiosity, and DML by establishing rapport, connection, recognition, and small-scale relationship in a digital space. Further research could illuminate and explore the impacts of such engagements.

A potential limitation is that the cohort utilized in this study included students from all academic years. Given potential implications for persistence and retention, coupled with research showing the importance of retaining students from their first to second semester, studying a cohort of first-year students may yield additional data on the effectiveness of this intervention. Also, conducting this study on a larger cohort and over a longer period of time could yield generalizable and longitudinal data on student attainment.

Another potential limitation is that *others* in this study were from a different college than the study participants. While this provided rich opportunities to match along multiple parameters of *otherness*, research among students on the same campus may yield interesting and potentially more important data on campus climate.

It is also important to continue assessing and refining what is meant by difference. Students in this study took surveys measuring policy differences, answering demographic questions, and completing scales on belonging, curiosity, and engagement. Though all data points were used to match students with an *other* across one or more parameters, the political and policy surveys may have played an outsized role. Researchers conducting future studies may wish to further refine this process.

Several students in this study experienced an issue with the digital interface that had the potential to impact their experience, from technical difficulties that delayed conversation or forced students to use the phone, to user error preventing students from effectively navigating the online engagement interface. Future studies can make the scheduling process smoother or conduct the micro-interventions during class time. Though challenges and missteps did occur for some, the data indicate that students who experienced challenges and missteps generally still had meaningful engagements.

Conclusion

At the core of this research is the proposition that engagement with one's *other* in a semi-structured, relational micro-intervention in a digital space has the potential to foster rapport, recognition, and connection across difference, leading to the building of small-scale relationships, and increasing sense of belonging and curiosity among college students. This in turn could positively impact campus climate and student attainment. It may also influence how students engage with their larger communities, an important aspect of DML. College students are citizens of a global and rapidly changing world who have the potential of impacting the direction of their communities and society. Given this, it is critical that community college leaders teach DML skills on how to engage and build relationships with those who are different (Hall et al., 2010; Hargittai et al., 2010; Kahne & Bowyer, 2016). Of course, one intervention is not a silver bullet, and no one thing can solve these persistent and stubborn challenges. However, micro-interventions (Aguilar et al., 2014; Walton & Cohen, 2007; Walton et al., 2015) can have large impacts. By focusing on all students, both marginalized and privileged, community college leaders can ensure that students from all backgrounds learn how to engage with each other.

Given the current U.S. political context—a nation divided (Enter the Electome, 2016; Suh, 2014)—and the resultant siloing and filter bubbles (Hargittai et al., 2010; McGrew et al., 2018; Enter the Electome, 2016), strategies that create bridges to connect and foster relationships among us are critical (DiMaggio & Garip, 2012; Hurtado & Ponjuan, 2005; Locks et al., 2008). Because of the increased media attention to ideological and policy divides, as well as the vilifying and *othering* of historically marginalized groups, including our undocumented neighbors, Muslims, Deferred Action for Childhood Arrival (DACA) recipients, the Black community, and women as they work to have their voices heard through the #MeToo movement, the political will may now exist to address and heal these divides on campus before they become normalized in our societal structure and go on to reverberate in communities across the U.S.

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APPENDIX A: Conversation Guide

Civity interactions are both intentional and focused on authentic human connection – the head and the heart working together. You are offering authentic respect and understanding in the hope that your authenticity will be reciprocated.

Offering authenticity to another person who you don't know that well can be a little risky – you might feel a little uncomfortable – that's natural!

1) **Begin the Conversation:**
   - Exchange greetings
   - Give some of your background
   - Invite the other person to introduce themselves
   - *Go deeper* – Explain how you care about your community, and tell a short personal story about where that comes from.
     - This may feel risky as you are offering up a side of yourself that in most situations remains hidden.
   - Invite the other person to reciprocate, to explain where their civic passion comes from.
     - Remember to truly listen to them.
   - Thank them for sharing their story; it's a gift to you!

2) **Deepen the Conversation:**
   - Explain that you'd like to explore/understand; articulate the difference between the two of you, and, if it does, why it makes you somewhat uncomfortable.
   - Ask/invite the other person to tell you one of their stories about that difference, or another.
   - Listen to the other person's story, being intentional about providing space for them to tell their story honestly and genuinely. Also be aware of your own story, through which you are listening.
   - If it makes sense, share a story of your own that focuses on the difference.
   - Thank them for sharing their story!

3) **After the Conversation:**
   - Don't worry if the other person did most of the talking – that means you successfully created the space for that person to be heard!
   - Reflect on what happened; think about bringing a Civity mindset to other conversations.

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Alma Simounet
University of Puerto Rico, asimounet2002@yahoo.com

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The Good, the Bad, and the Ugly: The Construction of Othering in Edward Bliss Emerson's Caribbean Journal of 1831-1832

Abstract

This paper examines the vocabulary, grammar structures and rhetorical devices that appear in Edward Emerson's journal based on his trip to the Caribbean. The end-in-view is to identify the devices that Emerson utilized, mostly unconsciously, in his depiction and construction of others; in the case of this journal, of the peoples he encountered in the Caribbean. The methodological approach of critical discourse analysis guides this examination.

Keywords

Edward Bliss Emerson, West Indies, St. Croix, Puerto Rico, New England, Othering

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The Good, the Bad, and the Ugly: The Construction of *Othering* in Edward Bliss Emerson's Caribbean Journal of 1831-1832[1]

Alma Simounet
University of Puerto Rico, San Juan, Puerto Rico USA

This paper examines the vocabulary, grammar structures and rhetorical devices that appear in Edward Emerson's journal based on his trip to the Caribbean. The end-in-view is to identify the devices that Emerson utilized, mostly unconsciously, in his depiction and construction of others; in the case of this journal, of the peoples he encountered in the Caribbean. The methodological approach of critical discourse analysis guides this examination. *Keywords: Edward Bliss Emerson, West Indies, St. Croix, Puerto Rico, New England, Othering*

Introduction

When asked for a definition of language, many will readily say that it is a tool for communication. What they do not explain is how language varies depending on its function or use in a particular context of communication. This essay examines the words used by Edward Bliss Emerson in his 1831-1832 journal of his visit to the Caribbean islands of Saint Croix, St. Thomas, and Puerto Rico. It is an in-depth look at the language that is typically associated with the description of places visited by individuals whose basic aims are to either keep a written memoir of their experiences in the form of a journal or letters, or share the results of their experiences with potential readers such as family, friends or the book-reading public.

Ethnographies or descriptions of cultures are primarily the responsibility of cultural anthropologists. However, throughout history, as is the case of Greek writers Tacitus and Pausanias, the retelling of these stories in the form of unedited personal letters and journals or published accounts has become part of the genre known as historical travel literature (Riggins, 1997).

Emerson's journal is an excellent example of this literary genre from the 19th century. It is also the personal repository of his experience abroad "in search of health" (Frawley, 2004, p. 113), and as such sheds light on the scholarship on *invalidism*. This term refers not only to a condition of disability among individuals, but also to the literature on this phenomenon and the study of cultural and social responses to notions of incapacity. Within this area of knowledge, there are many personal accounts of travel reports of the so-called invalids; to name a few, we have Bullar's 1861 *Letters from Abroad, from a Physician in Search of Health,* Blake's 1886 article, *Try the Bahamas*, and the anonymous publications *Summer Tour of an Invalid in 1860* and *A Voyage to Australia for Health* in 1884 (cited in Frawley, 2004).

In her book on *Invalidism and Identity in Nineteenth-Century Britain*, Frawley states that

[1] Edward B. Emerson's Caribbean journal and letters can be accessed online at http://bibliotecadigital.uprrp.edu/cdm/ref/collection/librosraros/id/1701. Unless otherwise specified, his letters from that period can be found in that text. Permissions to quote from Edward Emerson's journal and letters have been granted by the Ralph Waldo Emerson Memorial Association and Houghton Library, Harvard University, and the Massachusetts Historical Society, and are gratefully acknowledged.

> …a market for travel literature by invalids in fact thrived throughout the nineteenth century. The steady flow of such travel accounts throughout the period suggests that their appeal extended beyond fellow sufferers and that these texts satisfied cultural needs different from those of narrative adopting the private confessional stance. Many travel accounts either written by invalids or directed to them simultaneously served a population of armchair travelers in Victorian England. (p. 116)

There is no indication that Emerson wrote his journal with the goal of publication. However, as a personal document, it constitutes relevant documentation for the scholarly study of invalidism and the travel literature associated with it.

Emerson's journal may thus be viewed from a myriad of perspectives. However, the aim of this study in particular is to present the results of a close reading of Emerson's words in order to extract from the language used in his writing a clearer view of the descriptions of the experiences he lived. It is thus also an attempt to unveil or uncover the ideas that he utilized unconsciously to make these descriptions, and, through them, his own construction and representation of the people, places and events he observed.

According to recognized scholars in the study of culture such as Bhabha (1994), this aspect of the representation of *others*, of those that belong to cultures different from ours, is the result of an unconscious dimension of thinking. Most of us use it to classify, make interpretations and evaluate other people and the activities in which they engage (Lustig & Koester, 2010). As to the term *others*, it is part of the common terminology used in anthropology, sociology, cultural studies and discourse analysis. It is used to refer to "all people the Self perceives as mildly or radically different" (Riggins, 1997, p. 3). The terms *othering*, *otherness* and *alterity* are also prevalent in the literature and are used to describe the result of this cognitive process.

Anthropology, as a discipline historically constituted to understand others, coined the term "ethnocentrism" to explain our participation in the understanding of those different from us. Anthropologists tell us that we "think, feel, perceive, and perform from a certain perspective that we have acquired in the process of becoming human…" (Grimson, Merenson, & Noel, 2011, p. 9, translated from Spanish by this author). As a result of this, we cannot understand immediately those views that are different from ours unless we engage in a process of deep reflection. Emerson's descriptions of Caribbean island places, people, and events therefore must be viewed under the rubric of the ethnocentrism that permeates our way of thinking. Ethnocentrism elevates the values of the society to which we belong to the category of universality; thus this social construct becomes the only frame of reference in our observation of others (Todorov, 1991, as cited in Grimson et al.). This is precisely, then, how Emerson's descriptions are to be seen and understood: within the scope of his New England upbringing and his European-oriented education.

Methodology

The theoretical and methodological approach of critical discourse analysis (CDA) (van Dijk, 2009) provides the most appropriate perspective to analyze Emerson's journal (Riggins, 1997). The qualitative aspect of this method ensures that findings are not merely numbers and statistics, but that the subtleties of the phenomenon undergoing study are clearly seen. This approach employs the qualitative method of analyzing written texts through close readings of them and is based on the belief of anthropologist and linguist Dell Hymes (1962) that language is first and foremost a socially situated cultural form. This posture recognizes and understands that much of the linguistic form cannot be separated from how and why it is

used. In relation to this understanding, Saville-Troike (2003) believes that this view and each of its subsequent developments "…stress the need to look at the larger sociopolitical contexts […], claiming that those contexts may determine features of […] use in ways that are not evident from a focus on language alone…" (p. 253).

Critical Discourse Analysis (van Dijk, 2009; Wodak & Meyer, 2009), as a methodological approach, is grounded on the belief that the relation between words and truth is problematic. Any text, written or oral, is viewed as a selection and an interpretation of events. Therefore, the representations that are made of events are characterized by a possibility of different and ambiguous meanings that entail some fact and some fiction (Riggins, 1997). No matter how committed some writers are to the accuracy and truthfulness of the ideas they put into writing, all of us are "unwittingly trapped in a world of biased perceptions and 'stories,' all of which both exceed and shortchange 'reality'" (p. 2).

In 1995, Fairclough, one of the original scholars working with CDA in the 1990s, together with van Dijk and Wodak, referred to discourse as "the language used in representing a given social practice from a particular point of view" (1995, p. 56). This language then does not reflect 'true' reality because it is based on a different reality, constructed and shaped according to the personal interests of the writers (Riggings, 1997) and to the socio-cultural values the writers learned in their own process of socialization and enculturation. CDA is also involved in the relationship between language, power, and privilege. This study, however, will focus on Emerson's construction of reality through his use of language, without necessarily eliminating the dimensions stated above.

Some linguistic structures and discursive strategies, together with other stylistic devices of language use, provide the framework for identifying the language items used in constructing the writer's own realities. The language components included here are lexical items or words—their selection, use, meanings and emotional charge, pronouns (*we* vs. *they*), possessive modifiers (*our* vs. *their*) and language structures associated with the passive voice, verb modals (use of modal auxiliaries such as *may*, *must*) and the use of adverbials such as *certainly*, *unfortunately*, *obviously*.

Discursive strategies refer to ways in which language is used or put together in order to create an idea that is not necessarily the one intended by its dictionary or denotative meaning. Examples of these include the use of absolute negatives or positives such as *nil* and *superb*, stereotypes, figures of speech such as metaphors and similes, repetitions for emphasis, expressions characterized by vagueness and ambiguity, and the reliance on both presupposed and absent information. The former is information that is merely implied. The latter is information that is neither provided nor implied. It is these two types of information that prove to be the most elusive and thus difficult to extract (Fairclough, 1995). As to stylistic devices, they are those aspects of language use that are characteristic of the particular style of the writer. They may also entail using language whose register is associated either with formal or informal language, that is, with the use of simple or more complex words, expressions and sentences.

Presentation of Findings and Analysis

The main objective of this project is to identify the linguistic, discursive and stylistic aspects of Emerson's words, which reflect the writer's construction of his own reality based on this *other* context, the new situation in which he found himself in the Caribbean. These aspects are presented and discussed following the three categories proposed in the title to this study: the good, the bad and the ugly, as he described them in each of the three islands visited. The findings presented here are a sample of an ongoing research regarding this fascinating work. Taking Frawley's (2004) discussion of invalidism in the nineteenth century

and another travel account, by an anonymous invalid (*A Winter in the West Indies and Florida,* 1839), it is clear that some themes within this category of travel literature are a constant feature: climate, landscape, food, Blacks and Puerto Ricans, together with the dialect, music and personal qualities of the two aforementioned ethnic groups. The recurrence of these themes is reflected in the presentation of the most salient findings.

It is relevant to add at this point that the presentation of findings is based on the notion of binary opposites as the title of this essay reads. Thus the good and the bad are radical opposites which are bonded into a dialectic experience (Gikandi, 2011) that is then extended to the notion of ugliness. This dimension is merely an increase in degree of what is already bad. This study has already identified these stances of apparent polarity in some of the comments that Emerson provides about similar, if not equal, experiences as revealed in the recurrent themes mentioned above: for example, motion vs. inertia, overeating vs. undernourishment, fine vs. miserable weather, blistering sun vs. shining star, rude vs. happy music, feelings of loneliness away from his spiritual surroundings vs. feelings of independence in terms of his religious beliefs, happiness vs. ignorance, to name a few.

"The Good"

In order to understand the positive aspects of his new environs, it is important to bear in mind the reasons for which Emerson came to the West Indies. As mentioned earlier, Frawley (2004) comments on the importance of more temperate and warmer climate, such as in the Caribbean, and in the "search of health," that characterized the published and unpublished journals of those afflicted with incapacity. According to her, highly embellished descriptions of the scenery, of the beauty of nature, and of the balmy climate and its remedial effects run throughout these works. Emerson's text is no exception. The examples of positive comments that appear below are relevant to each of the islands he visited.

St. Croix

In the examples below, note the use of the adverb *kindly* to personify the climate and the totality of remedial power with which Nature is bestowed to provide remedy; the choice of a heaven-like adjective such as *glorious* to describe the ocean, and the participial verbs in adjectival form *untossed* and *unterrified* to create a posture of ease and security. Finally the climate is crowned with a Biblical reference, that of Paradise itself.

> …the climate grows kindly and perhaps [Emerson's underlining] he gets well by some of the many remedies which nature here holds to every sense. (4 January 1831)

> I walked to the shore and looked at again on the broad ocean which is truly a glorious sight to one who views it in security from an isle like this, untossed and unterrified. (6 January 1831)

> Well has Edwards called this the climate of Paradise. (23 January 1831)

In the example that follows, the description involves the local food, especially the tropical fruit of which he spoke highly. This is obviously connected to its nutritious and remedial value. Emerson goes to great lengths when writing about the delicious and plentiful variety of fruit, a topic that fascinated him (see Rigau-Pérez, 2014).

> [The soursop] is very agreeable if taken in small quantity early in the morning and is said to be recommended to invalids, especially the febrile. (6 January 1831)

Despite some inconveniences concerning his perception of the local population--to be discussed below--Emerson found St. Croix to "abound in politeness" and the Black population to be "tranquil" and "civil."

St. Thomas

Although Emerson was in St. Thomas twice, first in 1831 and then again in 1832, his first visit was very brief, only one day, on board the ship that would bring him to Puerto Rico. Emerson described the scenery as follows:

> A fine morning shows this beautiful place to great advantage. Its peculiar situation & threefold division on English, French man & Government hills is [sic] picturesque. (5 April 1831)

His description of this port in 1832 confirms his initial aesthetic pleasure with the views.

St. Johns (San Juan, Puerto Rico)

When describing the historical aspects of the city of San Juan, which he referred to as St. Johns, Emerson's style is one of formality, careful choice of words that project beauty and elegance, of metaphoric language; this represents his best written discourse.

> Imagine yourself then a well-fortified city, -with lofty walls encircling its entire extent. Supporting ramparts from which, at due intervals, jut forth round sentry boxes, and huge cannons peep through the embrasure, -so strong by art, that the first glace assures the visitor of security against hostile attempts… (Journal, Appendix 2)

> …conceive this city to be bounded on the north, on the east, & on the west by the sea & on the south by an arm of the same which after forming a commodious & graceful port passes on eastward and joins the sea again… (Journal, Appendix 2)

> So rich & peaceful is the scenery from the southern side that one is almost tempted to suppose as his eye glances first on the walls and then on the opposite country, that some stout pilgrims tired with the tumult of European traffic & contention, wisely fixed on this spot their home & altar, resolved to defend themselves as in a newfound Paradise & seek nothing but how best to enjoy the garden so happily discovered. (Journal, Appendix 2)

The scenery and climate of Nature's gift to the island was also praised through the use of embellishment in the choice of nouns, adjectives and verbs, the use of absolute positives (*no better climate*), metaphors and an elegant prose.

> I walked on the ramparts & thought the Elysian fields could enjoy no better climate & scarcely a finer prospect than that which lay to the South and

> Southwest across the bay. Those evergreen hills now darkened now irradiated as the clouds rise and fall between them & the Spectator, or between them and the King of the day, are a beautiful resting place for the eye, their clothing of bushes and trees is ornamental and attitudes or arrangement quite picturesque. (23 May 1831)

“The Bad”

Two themes that evoked in Emerson the tendency to construct negative images of the Caribbean were those that were foreign to him in the environment in which he was socialized and enculturated: large numbers of Blacks vs. a small population of Whites, as was the case in both St. Croix and St. Thomas and, in the case of Puerto Rico, a society mainly made up of descendants of Spaniards, Blacks and a mixture of both, whose culture was characterized by major differences from that of Emerson’s New England. This notion of difference is harmonious with the concept of ethnocentrism as put forth by anthropologists who place it at the heart of the construction of alterity or otherness. Ethnocentrism is a common human tendency in which the patterns of one’s own culture are held as superior to those of others (Lustig & Koester, 2010), thus creating ideas of rejection of that which is ‘not like us’ or ‘beneath us.’ The comments that fall under this rubric, many of them harsh, reflect these visions.

St. Croix

Emerson commented on slavery, but these were reports on what he heard from the White members of the Crucian community. He did, however, frequently comment on the ways of speaking and language of the Black community. Notice in the examples given below the use of the word “dialect” to demean their linguistic system. This word used to refer to a “broken form or non-standard form of a language.” It is now used in the discipline of linguistics with a neutral meaning to refer to the various systems in which languages manifest themselves; thus American English is a dialect or variety of English and so is Received Pronunciation in England, Singapore English, and South African English, to name a few. Colombian Spanish, Castilian Spanish, Puerto Rican Spanish and Mexican Spanish are also varieties of the language called Spanish. There is no evaluative tone in this classification as there was in the former use of “dialect.” The same is true for the term “patois.” Emerson knew he was not a philologist, but he still ventured forth making negative comments about the ways of speaking of the Blacks. In a famous study on language attitudes, Lambert, Hodgson, Gardner and Fillenbaum (1960) discovered that early in adolescence we construct negative attitudes towards others’ ways of speaking; these are reflections of negative attitudes towards others as people, for it is easier and socially more acceptable to discriminate openly against a people’s language than against the people themselves.

Notice in the second quote the use of the progressive form of the verb “chattering” used as a noun modified by the adjective “voluble” to describe the spoken language of Blacks as a constant exchange of unimportant ideas, thus implying the emptiness of meaning in the communicative act among them. The third example is one of lack of intelligibility, but as it is voluntary, he implicitly suggests it is an indication of obstinacy or defiance. From a linguistic perspective, this example in particular is a comment about a speaker’s use of the local Creole language spoken widely on the island at the time and whose intelligibility to non-Creole speakers of English fluctuated from a speech that could either be close to English or very far away from it.

> Dialect of negro servants a complete English patois with a droll voluble singsong manner. (5 January 1831)

> Note voluble chattering of negroes precisely like that of lower orders in Marseilles or Italy. (22 January 1831)

> Mrs. D. bought some ban-bush at house of a free old negro woman whose talk was as far from English as any other, except when she strove to be intelligible, & this is not uncommonly the case here. (2 March 1831)

St. Thomas

Again, the brevity of the first stay provided little data. Still the island was compared to Italian cities in the constant talk about unimportant things coming from the mouths of Blacks.

> It reminded me of the Italian cities by constant chatter of negroes, which is as unintelligible as a strange tongue. (5 April 1831)

St. Johns (San Juan, Puerto Rico)

Either because of the length of Emerson's extended stay in Puerto Rico, which provided him with the opportunity to get to know the island better or because of the pronounced differences between San Juan, a Spanish city, and the island of St. Croix, Emerson presents bad and ugly comments of San Juan, the place, the people, and the activities. The quotes below speak directly to his very negative view of San Juan. Notice the choice of words to describe what he saw: the use of absolute negatives (*no books*, *image void of beauty*), the comments full of sarcasm (third example), the portrayal of society as being ignorant and having no literature, the poking of fun at the military, the description of the music as rude, and the sweeping statements about the lack of interest among the men to strive for perfection in comparison with the men in New England. The citations below epitomize how ethnocentrism, kept at an unconscious level, creates the perfect model for the creation of alterity.

> ill odors rushing from the doors & courtyards. (7 April 1832)

> no bookstores, but several variety shops, & chocolate & grocery stores. (17 April 1832)

> 13 servants about the house do the work which a third of the number might as well or better perform. (7 April 1832)

> no literature. (8 April 1832)

> Troops in white: not exhibiting the discipline of West Point. (8 April 1832)

> Song & music rude enough but *muy alegre* strikes the ear… (13 April 1832)
> After breakfast walked, read, visited one of the churches large & vaulted but without the splendor & art of Italy & France. Image void of beauty must derive all value from the association & company. (17 April 1832)

> Others of the negroes had rattles made of calabash & called in English 'shake shake' a name excellently descriptive of the music…a boisterous singing & violent jumping joined to the clatter… (5 June 1832)

The following is a long commentary whose words reflect Emerson's strong feelings about the city: that it is an ugly reality in San Juan. This marked emotion is felt through the use of repetitive absolute negatives (no lectures, no sermons, etc.), absent information and grandiose style:

> It is very possible that much more intellectual and moral entertainment might be furnished to the thousands of ignorant people to be found here, in both upper & lower classes of society; & some attention to this subject is extremely desirable. It is a pity that no other amusements, than games of hazard or even of skill & bodily dexterity & no other comforts than those of repose & common conversation should be offered to thinking men. No lectures, no sermons, no reading rooms, no public libraries, even the theatre not yet completed…this is an excess of apathy or ignorance, as to the value of the intellectual faculties & the need of cultivation… (26 June 1832)

Again the demeaning of the music produced by the "bands of negroes" and the indirect reference to their lack of intelligence is clearly stated:

> Walked tonight, saw a band of negroes dancing to drum & shake shake & congo upon the ramparts, singing a simple tune with I should think not more than three different notes, & perhaps no meaning- & moving backwards & forward from within a circle with a step as uniform as the song, & such as it needs no Monsieur to teach… (26 June 1832)

This is followed by the direct comparison with New England:

> Men do not strive here as in N.E. after the *perfect man.* It is present *pastime* or *gainful* industry or chance which they follow as their stars. (3 July 1832)

The lines that follow are a devastating condemnation to any society.

> I say not that there is no internal piety or virtuous effort or sacrifice here, but if such fruits do abound, the leaves & the blossoms are so scanty & the produce so disposed of as to make the vineyard very unlike the pictures of a 2d Eden that see form under the instructions of northern divines….Still I fear there must be much crime & impurity—mingled with the ignorance of the people about me. I am told of priests who have been beastly drunkards, & great cockfighters. I see much gambling. I hear of bribery as the great advocate in lawsuits; of duelling [sic] …I hear hardly a book named; I see the people go to mass but they seem to have little respect for their clergy & this...must I think render their religion nearly stationary if not retrograde in respect to its influence in stimulating the mind towards imitation of divine perfections… (7 August 1832)

These are strong negative comments coming from a man who is highly religious and well educated, but who cannot escape the humanity that engages all of us into the creation of a condemning view of a cultural other.

Although Edward Emerson's Caribbean journal for 1831-1832 constitutes an important document for study under the rubric of travel literature and the literature on invalidism, this essay focused on a close reading of the writer's words in his descriptions of people, places and events in St. Thomas, St. Croix and Puerto Rico. The objective was to present linguistic evidence from the work itself about how Emerson's words provided a blueprint to his own construction of others. This representation followed the cognitive processes of his inner unconscious and ethnocentric mind, the product of a particular enculturation and socialization process. This type of mind is also one that easily falls prey to this type of perception and characterization in our encounters with others and is unfortunately present in the majority of us (Lustig & Koester, 2010).

In addition to the objective of this study as presented above, the analysis of the work of E. B. Emerson will provide the reader with a wider perspective of the Caribbean as seen through the eyes of a brilliant individual who had traveled here as a very ill man. It will also open other venues into the analysis of travel literature in an area in the world that in the 19th century in particular was considered an ideal place to find health. However, throughout colonial times, the Caribbean had been viewed as the seat of corruption and evil in terms of language, morality, and health, as historical documentation reveals. These contrasting views serve to underscore the importance of the study of the perspective of binary oppositions in the portrayal of the Caribbean.

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Author Note

Alma Simounet is a Professor of English and Linguistics at the University of Puerto Rico. She is an active member of the Ph.D. Program in the Literature, Language, and Culture of the Anglophone Caribbean. Her areas of research are Bilingualism, Ethnolinguistics, and Discourse Analysis.

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Correspondence concerning this article should be addressed to: Alma Simounet; E-mail: asimounet2002@yahoo.com

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RESEARCH ARTICLE

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Othering in the nursing context: A concept analysis

Mary Lee A. Roberts | Martin Schiavenato

College of Nursing, Washington State University, Spokane, WA, USA

Correspondence
Mary Lee A. Roberts, College of Nursing, Washington State University, Spokane, WA, USA.
Email: marylee.roberts@wsu.edu

Abstract

Aim: 'Othering' is described as a social process whereby a dominant group or person uses negative attributes to define and subordinate others. Literature suggests othering creates exclusive relationships and puts patients at risk for suboptimal care. A concept analysis delineating the properties of othering was conducted to develop knowledge to support inclusionary practices in nursing.

Design: Rodgers' Evolutionary Method for concept analysis guided this study.

Methods: The following databases were searched spanning the years 1999–2015: CINAHL, PUBMED, PsychINFO and Google. Search terms included "othering", "nurse", "other", "exclusion" and "patient".

Results: Twenty-eight papers were analyzed whereby definitions, related concepts and othering attributes were identified. Findings support that othering in nursing is a sequential process with a trajectory aimed at marginalization and exclusion, which in turn has a negative impact on patient care and professional relationships. Implications are discussed in terms of deriving practical solutions to disrupt othering. We conclude with a conceptual foundation designed to support inclusionary strategies in nursing.

KEYWORDS

diversity, dominant power, dominant-subordinate relationship, exclusion, inclusion, othering, the other

1 | INTRODUCTION

In her illustrative and appropriately titled work, *The Second Sex*, Simone de Beauvoir provides a formative analysis of othering by specifying the ways men have consistently exerted their personal power to define women as "The Other" (De Beauvoir, 1989). Herein, de Beauvoir explains how men have often initiated a process of- othering by differentiating women according to a dominant male standard: "She is defined and differentiated with reference to man and not he with reference to her; she is the incidental, the inessential as opposed to the essential. He is the Subject, he is the Absolute – she is the Other" (De Beauvoir, 1989, p. xxii). In feminist literature this interpersonal process of generating of "the other", otherwise identified simply as othering, has been used to describe a sequence of events, whereby a person or group is differentiated from a dominant group in accordance with a chauvinistic social standard (Anzaldua, 1987). On the whole, nursing research has supported this premise, while indicating that difference is a foundational attribute to the othering process (Canales, 2010). In a similar way, social theorists have described othering as a process by which interpersonal differentiation generates a distinct form of social exclusion and subordination (Bourdieu, 1984, 1998; Dervin, 2012).

1.1 | Background

In the early 2000s, nursing researchers began using these and similar descriptions to work at framing othering as a mostly negative and exclusionary process that can often times be based on racial and/or ethnic biases (Canales, 2000, 2010). For example, it was in these

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explorations into othering in nursing practice where the othering concept emerged as a useful descriptor of adverse nurse-patient encounters, especially in cases where patients were differentiated into racial and ethnic categories and treated in a subordinating way (Browne, 2007; Johnson et al., 2004). And even though these studies provided ample patient testimony describing the negative and exclusionary environments associated with nurse-patient othering, no elemental definition aimed at a specific formulation for how othering operates as an inter-personal social process was proposed, either for nurse-patient, nurse-nurse, or inter-professional relationships.

More recently, research has explored how nurse-to-nurse gender-based differentiation has an impact on the experiences of both male nurses and male nursing students, particularly in settings where the male nursing identity is marginalized by a dominantly female-centric nursing workforce (MacWilliams, Schmidt, & Bleich, 2013). Additional research has worked to align conceptualizations of othering in relation to inequities inherent to inter-professional relationships, such as the nurse-physician relationship (Weeks, 2005). And although these studies focus on a range of distinct populations, what remains consistent across nursing literature is the premise that othering can potentially develop into exclusionary patterns of behaviour; the outcome of which is a perpetuation and reinforcement of already existing healthcare, educational and workplace inequities based on gender, race, ethnicity and other categorical social constructs (Ellis, Meeker, & Hyde, 2006; Vasas, 2005; Weeks, 2005).

In exploring options aimed at reducing the impact of exclusionary social processes on patient care, a series of reports emerging from the Robert Wood Johnson Foundation (RWJF) Initiative on the Future of Nursing suggest that gender diversity and inter-ethnic inclusion in the nursing workforce can lead to improvements in patient care (Institute of Medicine, 2011; Robert Wood Johnson Foundation, 2012). And indeed, several of these RWJF reports indicate that a nurse-patient inclusionary understanding of gender and ethnic differences promotes better nurse-patient communication and healthcare outcomes, as some patients are more receptive to healthcare providers from similar backgrounds and gender (Ayoola, 2013; Lecher, 2014). Hence, with men comprising less than 10% of the current nursing workforce and with only 19% of registered nurses being from ethnic minority backgrounds (United States Health Resources Services Administration, 2014), findings from these RWJF reports suggest that the nursing profession should confront two direct challenges: (i) Design and implement initiatives aimed at supporting a more gender and racially diverse nursing workforce; and (ii) Identify and disrupt exclusionary social processes (e.g. othering), which counteract efforts aimed at advancing diversity and inclusion in nursing practice and across the nursing workforce (Institute of Medicine, 2011; Lecher, 2014; Robert Wood Johnson Foundation, 2012).

To address these challenges, this concept analysis aims to define othering by analyzing its elemental properties in: nurse-patient, nurse-nurse and inter-professional relationships, using the Rodgers' Evolutionary Method for concept analysis (Rodgers & Knafl, 2000). In following a precedence set forth in previous investigations into othering (Canales, 2010) and to sharpen our focus on how othering emerges in interpersonal contexts as an operative exclusionary process, this concept analysis will incorporate writings from feminist and social theorists who have specifically addressed interpersonal exclusion and differentiation. The fundamental objectives of this concept analysis are: (i) Explore the potential for concept-based findings to inform efforts aimed at disrupting the othering process in nursing; (ii) Provide information to support gender and ethnic diversity in the nursing workforce; and (iii) Investigate formulations for inclusionary practices designed to improve patient care.

2 | METHODS

The Rodgers' Evolutionary Method, an approach specifically developed to analyze an evolving concept based on an interdisciplinary inquiry, served as a procedural guide for this concept analysis (Rodgers & Knafl, 2000). Our use of this methodological approach was divided into three phases following Tofthagen and Fagerstrom (2010): (i) The Initial Phase: concept and context are identified and literature is reviewed to obtain data for analysis; (ii) Findings: definitions, related concepts, antecedents, exemplar and attributes are identified; and (iii) Discussion: consequences, conclusion and implications for further research. Ethical approval was not required for this study.

2.1 | The initial phase

2.1.1 | Concept and context are identified

In its most basic conceptualization, othering serves to empower individuals by motivating them to notice comparable differences in others and the particular ways these "others" do not adhere to a dominant social standard (Gillespie, 2007). A nurse exerting his/her power to reinforce interpersonal differences based on a dominant social standard—often in terms of race, ethnicity and/or gender—is a recurring example of othering in literature. In this context, nursing literature has described othering as a process that reinforces a dominant nursing standard and generates exclusionary, albeit negative relationships amongst healthcare professionals and between patients and nurses (Browne, 2007; Canales, 2010; Kada, 2010).

2.1.2 | Literature review and data for analysis

The following databases were searched: CINAHL, PUBMED, PsychINFO and Google Scholar. Keyword and title searches for the terms "othering", "nurse", "other", "exclusion" and "patient" were carried out for the years 1999–2015. All documents were limited to the English language. These searches yielded a group of 308 sources, which ultimately was reduced to 152 unique documents after accounting for the overlap between databases. Search results were further limited by their specificity to the stated population and the objectives indicated for this analysis, which resulted in a definitive group of 28 sources that met the limits of these criteria.

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3 | FINDINGS

3.1 | Definitions

Nursing researchers have regularly used and adopted social theoretical conceptual frameworks to formulate descriptions of othering, where social theorists have explained and described othering and related exclusionary relationships in terms of a sequential process culminating in inter-relational differentiation and subordination (Bourdieu, 1984; Burgess & Park, 1969; Said, 1993). This process can typically commence with a given dominant person or group recognizing the existence of an accepted "normal" social standard for behaviour, which in turn facilitates the operability of a social environment defined by this dominant person or group. Hence, when this dominant-defined social environment is challenged and/or stressed by individuals who do not conform to this normal social standard, the dominant person or group responds by identifying and differentiating, that is, othering these non-conforming individuals, who are then relegated to the status of "the other". In creating difference through othering, potentially the dominant person or group is empowered while the non-conforming "others" are consigned to a substandard status, which in theory would restore the dominant-defined social environment to its former prominent status (Bourdieu, 1998; Burgess & Park, 1969; Canales, 2000).

Nursing literature has appended to this conceptualization of othering in several fundamental ways. For example, MacCallum (2002) has accentuated the dual importance of exclusion and identity in othering, saying that a group of nurses or patients "is not necessarily defined by those who are in it but by those who are excluded from it"(p. 87). And where social theorists have suggested that the basic operations and interpersonal processes related to othering are a mostly unconscious process (Bourdieu, 1998), nursing literature has recognized both conscious and unconscious formulations of othering. Hence, Canales (2000) has suggested that othering can at times be manifested as both a conscious and intentional process, while Mee (2012) and Browne (Browne, 2007) suggest that othering is frequently an unconscious, albeit unintentional practice in the nursing profession.

3.2 | Related concepts

In accordance with its definitional characteristics, othering has principally been associated with exclusionary concepts and social practices. However, with further study and investigation, we find that the othering concept's association with exclusionary social practices has merely served as a point of reference in nursing; as it is evident that several nursing researchers have gone on to explore alternative othering-related concepts and proceeded to reformulate othering into an inclusionary, rather than exclusionary, social process (Canales, 2010). For this reason, we present concepts related to othering that are characterized by exclusionary practices, as well as those concepts that appear as inclusionary re-formulizations of othering and work to construct inclusionary relationships in nursing practice.

3.3 | Exclusionary concepts

Nursing literature has consistently associated othering with these related concepts: marginalization, stereotyping and racialization (Browne, 2007; Canales, 2010; Evans, 2002; Tang & Browne, 2008; Vasas, 2005). In a nursing research concept analysis of marginalization, Vasas (2005) has suggested that marginalization can be described as a distinct process that enforces the dominant/subordinate social differences created by othering. In following this definition, marginalization can therefore be understood as an outcome of othering. For example, nursing literature refers to patients subordinated by a dominant bio-medical othering process as subsequently being marginalized to an excluded status in the healthcare system (Meleis & Im, 1999). In a making a similar association with othering, nursing research has conceptualized stereotyping as a tool used by a dominant nursing group to classify patients or colleagues who do not conform to a normal social standard (Drevdahl, Canales, & Dorcy, 2008; Tang & Browne, 2008). In this sense, stereotyping is defined as a formulaic oversimplification of an individual or group identity and may be considered a co-process of othering that facilitates classification and exclusive social groupings (Browne, 2007). Racialization, in turn, has been considered a subcategory of stereotyping based on the concept of race (Tang & Browne, 2008).

Significantly, numerous sources in nursing literature have described marginalization, stereotyping and racialization as predominantly exclusionary processes that are related in some way or form to othering (Browne, 2007; Canales, 2010; Tang & Browne, 2008; Vasas, 2005). As will be further elaborated on below, this fundamental and powerful connection between exclusion and othering, as exemplified in instances of exclusionary othering in nursing practice, has had a considerable impact on the quality of patient care.

3.4 | Inclusionary concepts

3.4.1 | Inclusionary Othering

In contrast to the more ubiquitous exclusion-based characterizations of the othering process, Canales (2010) has documented multiple situations where marginalized nurses, as well as researchers and scholars, have used the inter-relational capacities of othering in an antithetical way and reformulated exclusionary othering into an inclusionary social process. In a ten-year retrospective analysis of othering (spanning 2000–2010), Canales (2010) presents a survey of the othering concept in nursing literature, including both exclusionary and inclusionary conceptualizations. Of particular note herein is Canales' original conceptualization of Inclusionary othering, which is offered as a positive countermeasure to the inherently negative exclusionary form of othering. As was first documented in her research circa 2000, Canales (2000) has described Inclusionary othering as "a process that strives to connect through difference" (p. 28). In these terms, Inclusionary othering uses the recognition of difference for alliance building, rather than as a mechanism for reinforcing marginalization and exclusion.

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3.4.2 | Role-taking and world-travelling

In her early investigations into inclusionary social practices, Canales (2000) initially situated her formulation for Inclusionary othering in the conceptual context of role-taking and world-travelling; two related concepts originating in social theory and feminist literature that serve as constructs for building inclusionary relationships. Similar to Canales' 'inclusionary othering', nursing researchers have further defined and subsequently used themes and variations on the role-taking and world-travelling concepts to develop nursing interventions aimed at countering the negative effects exclusionary othering. For example, Burbank and Martins (2010) have worked to define a relational mechanism for role-taking, or "taking on the role of the other", where a recognition for the positive aspects of social difference becomes the means by which coalitions are built based on an interpersonal understanding between nurses, patients and colleagues. In applying the role-taking concept to nursing education, Phillips and Peterson (2005) have constructed a comparable formulation for "taking on the role of the other", which they have used to develop a nursing education curriculum designed to enhance a nursing student's awareness for the situational circumstances of marginalized patients.

In a similar conceptualization to role-taking, feminist scholar and writer María Lugones (1987) has presented world-travelling as way to build relationships based on an understanding of interpersonal difference. Herein world-travelling is conceptualized as an extension of oneself by "travelling" to the world of "the other". As Lugones (1987) explains, "Only when we have travelled to each other's 'worlds' are we fully subject to each other" (p. 17). Bunkers (2003) has proposed two nursing practice-based manifestations for world-travelling, which are formulated to connect with patients and/or colleagues who may be at risk for, or potentially be socially situated as "the other". In this context, Bunkers (2003) sets forth two objectives: (i) Creating a hospitable patient care environment; and (ii) "attending to others with true presence," as ways to realize world-travelling and "push the edges of the boundaries of lived experiences…[by creating] possibilities for connecting with *the stranger* ['the other']" (pp. 307-308).

Lastly, it is important to note that these inclusionary processes (inclusionary othering, role-taking, world-travelling) often times arise from and emerge in the negative nature and consequences of the exclusionary form of othering. That is, these inclusionary responses to exclusionary othering may be considered as inherently positive reformulations of the othering process, inasmuch as they work toward manifesting positive outcomes from potentially negative circumstances (Canales, 2010).

3.5 | Antecedents and exemplar

To develop distinction for an evolving concept, Rodgers' Evolutionary Method prescribes a delineation of antecedents and an identified exemplar. Antecedents are pre-existing actions or causes that are consistently associated with a concept. The exemplar serves to illustrate how a concept operates in the nursing practice context (Rodgers & Knafl, 2000).

Nursing literature has consistently presented two essential antecedents of othering: the normal social standard and dominant power (Canales, 2010; Johnson et al., 2004; MacCallum, 2002; Weeks, 2005). In addition, it is noteworthy that literature has often characterized sources of dominant power, as well as normal social standards in such a way that they appear to instigate and activate the othering process (Canales, 2000; Johnson et al., 2004). In this sense, the normal social standard and dominant power antecedents co-operate by working to identify and create difference with non-conforming individuals, which in turn instigates the othering process and subordinates these individual(s) to a substandard status. The following is an exemplar from nursing literature showing how the normal social standard and dominant power antecedents can become operational in a nursing care setting and generate multiple instances of othering along with a series of potentially negative outcomes.

3.6 | The exemplar(s)

The exemplar chosen for this concept analysis is in fact a compilation of exemplary cases of othering based on Browne's (2007) ethnographic study: *Clinical encounters between nurses and First Nations women in a Western Canadian hospital*, which describes the experiences of Canadian nurses and First Nations (Aboriginal or Indigenous) women in a healthcare setting. Herein Browne describes a situation where nurses use a dominant discourse based on assumptive cultural differences to reinforce several normal social standards. In this context, Browne shows how nurses have supported dominant social standards while deriving personal power from reinforcing their assumptions that First Nations patients, in numerous and sometimes subtle ways, do not conform to the socio-cultural standards set forth by the dominant Canadian cultural power. Before proceeding, it is important to recognize that Browne's findings aim to show how, "nurses (and other providers) are *not* intentionally [emphasis added] engaging in othering practices" (Browne, 2007, p. 2724). Still, even in this framework, Browne's findings indicate that the normal social standard and dominant power antecedents remain to be effectual and potentially insidious components of the othering process.

3.6.1 | Othering exemplars

In multiple observational encounters/sessions where researchers "shadowed" nurses, Browne (2007) has captured recurring sequences of nurses unintentionally using a socio-cultural standard, along with their (the nurses') dominant power status, to initially identify and differentiate First Nations patients and then marginalize these patients to a substandard status. For example, these nurses were quoted as saying: "Some of them [First Nations patients] don't like us at all. You know it's been inbred in them from a very young age. They resent us" (Browne, 2007, p. 2171). While other nurses were found to assume that First Nations patients could potentially be "unclean or…vectors for infections" (p. 2171). It is noteworthy that many nurses in this study provided commentary explaining how First Nations patients are "different," (p. 2171) especially in terms of communication styles, but

also in seemingly analytical terms, where one nurse is quoted as saying, "What I find is that some patients, the Natives in particular, have a propensity to like narcotics" (p. 2174).

Browne (2007) also describes how nurses have used their collective power to identify and differentiate the "angry" (p. 2171) First Nations women and strategize ways to reduce contact with these patients. Herein Browne (2007) comments that nurses were: "Guarding against how the other [First Nations patient] might react [which] contributed to an observable form of social distancing that sometimes occurred between the nurses and some of the First Nations women they cared for" (p. 2171). Hence, by exerting their dominant power to enforce a normal social standard, these nurses effectively situated the First Nations patients into the role of the other, thus providing several exemplary and illustrative cases of othering in nursing practice.

Browne (2007) concludes her documentation of this study by noting the clinical outcomes of the othering process:

> *The consequences in terms of clinical practice are not insignificant. Patterns of social distancing, shaped by processes of* othering, *limit possibilities for therapeutic engagement particularly in relation to patients' psychosocial, emotion or material needs (p. 2175).*

3.7 | Attributes identified

Attribute identification provides a coherent basis for making a concept manifest and distinguishable (Rodgers & Knafl, 2000). Nursing literature has consistently listed the following attributes as part of a conceptualization of othering: the dominant-subordinate relationship, difference, identity and exclusion (Canales, 2000, 2010; Drevdahl et al., 2008; Johnson et al., 2004; MacCallum, 2002). The following describes the tangible ways these attributes operate as definitional qualities of othering and function as conceptual support mechanisms for the othering process in nursing practice.

3.8 | Dominant-subordinate relationship, difference and identity

Findings from nursing literature indicate that the dominant-subordinate relationship, difference and identity attributes function as interconnected collaborative operators aimed at manifesting an occurrence of othering. Hence, each attribute is formulated in a causal relationship with the other two, collectively working to generate a coherent course or trajectory. In this way, othering is ostensibly identified as a process of differentiation and self-identity reinforcement, which is sustained and supported by the dominant-subordinate relationship (Canales, 2000; Drevdahl et al., 2008; Gillespie, 2007; MacCallum, 2002).

Nursing researchers have described the causal relationship between the differentiation and subordination of "the other" as a self-perpetuating process used by a dominant force to consolidate and increase its identity and power. For example, Weeks (2004, 2005) has incorporated this premise into two studies of dominant-subordinate/physician-nurse relationships in perioperative and acute care settings. These studies contend that to maintain a powerful identity, the dominant physician entity frequently initiates the othering process to subordinate nurses in practice situations (Weeks, 2004, 2005). In turn, this initiation of the othering process has the potential to generate an impetus for nurses to assert their power as a dominant identity over their subordinates, who may be patients and/or other nursing colleagues. Feminist theorists postulate that this initial assertion of a dominant power (such as that originating with the dominant physician entity) sets in motion a sequential progression, whereby a series of top-down/dominant-to-subordinate processes of differentiation and subordination occur (Jackson, 1999). Canales (2000) offers a perspective on othering that resonates with this premise, which suggests that the othering process is dependent on the necessary attribute of differentiation and has the potential to reinforce a dominant identity through a series of inter-dependent dominant-subordinate relationships.

3.9 | Exclusion

The premise for the dominant-subordinate inter-dependent relationship has been a recurring and powerful stimulus for feminist and social theorists to further define the paradoxical identity of the socially excluded "other" (Jackson, 1999). The essence of this paradox lies in the fact that the othering process, while exemplifying the subordinate identity as visibly different, also excludes subordinate individuals from the dominant social context. In this way, the subordinate identity is made visible by differentiation, while simultaneously being made invisible by exclusion (Madrid, 1995). It is in these terms that exclusion emerges as an essential attribute to the othering process.

In a similar way, nursing researchers have explored how males, as a gender minority in the female dominated nursing profession, are at once seen as visibly different, while being excluded from fully participating in and contributing to the advancement of nursing practice (Evans, 2002; O'Lynn & Tranbarger, 2007). In a multi-national literature review, MacWilliams et al. (2013) present evidence of the ways the dominantly female-oriented nursing profession and educational academy have excluded a male-oriented perspective on nursing and effectively reduced the male identity in nursing into a binary categorization of "gay/emasculated" or "he-man/masculine" stereotypes (MacWilliams et al., 2013, p. 41).

In nursing education, male students claim that this binary categorization is partly due to the lack of male nursing faculty and the scarcity of male professional role models, both of which reinforce the notion that the male presence in the nursing profession should be viewed as different and therefore non-standard (O'Lynn, 2004). In the midst of this differentiation, male nursing students have experienced the direct and formative impact of being excluded from the female-dominated nursing profession, which has the potential to undermine their (the male nursing students') efforts to develop a male-centric professional identity in preparation for a career in nursing (McLaughlin, Muldoon, & Moutray, 2010; O'Lynn, 2013; O'Lynn & Tranbarger, 2007). This compelling evidence illustrates how the difference and exclusion attributes of othering can work in tandem to have an impact both on individuals and their group identity.

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4 | DISCUSSION

4.1 | Consequences

It is significant that both parties in the dominant-subordinate relationship experience a muted capacity for self-knowledge. For example, a male nursing student gains quantities of knowledge concerning the dominantly female-centric nursing experience, but possibly at the expense of an equal opportunity to develop a personalized male-centred identity for nursing practice (O'Lynn & Tranbarger, 2007). On the other hand, the dominantly female-based paradigms perpetuated in nursing education impede the academy's capacity to evaluate its own curriculum and find ways to learn from and incorporate the male nursing experience (Grady, Stewardson, & Hall, 2008; Kirk, O'Lynn, & Ponton, 2013). Similarly, dominant culture and bio-medical standards often times work in tandem to discourage nurses from researching the ways an inclusionary exchange of nurse-patient differences can inform practice and improve patient care (Canales, 2000).

In providing several contextual analyses regarding the consequences of the dominant-subordinate relationship in the othering process, Mee (2012) has proposed that a nurse's limited self-knowledge of his/her own habitually exclusionary behaviour is often manifested in a practice that unconsciously avoids and isolates those patients characterized as problematic or "aggressive"(p. 17). In consequence, this seemingly unconscious practice of exclusion/isolation reduces a patient's capacity to inform nurses of his/her health concerns and significantly puts patients at an increased risk for adverse health outcomes. For example, patients with dementia living in nursing care centres are over 30% more likely to be admitted to a hospital with avoidable complications such as urinary infections, pressure ulcers and dehydration (Quality Care Commission, 2013). Bail et al. (2013) show evidence that "these complications have been specifically associated with aspects of nursing work environments", where limited direct nurse-patient contact was correlated with a significant increase of a dementia patient's risk for these complications (p. 7).

These examples illustrate not only the barriers by which othering obstructs knowledge development and puts patients at risk, but also the ways this exclusionary social practice reduces the conceptual space to develop alternative processes and solutions. Indeed, this reduced conceptual space is evidenced by the findings of this analysis, which indicate limited information regarding theoretical propositions and possible interventional solutions for othering.

4.2 | Conclusion and implications for further research

4.2.1 | Summary of findings

Findings from this concept analysis reveal that othering is a seemingly sequential social process with a resolute trajectory aimed at exclusion and marginalization. In addition, evidence suggests that othering occurs as the product of causal and interdependent relationships between key antecedents and attributes that are essential to generating the process. Hence, the othering process begins with an established set of social and psychological conditions that generate a dominant social standard. This dominance is defined and reinforced by creating difference with a subordinate, "the other". This differentiation is in turn reinforced through exclusion, thereby furthering the dominant-subordinate relationship in a cyclical or self-reinforcing manner that promotes marginalization. Generally, othering is gender, ethnically and/or racially based, although this is not exclusively so and can be extended to include other non-conforming or "problematic" individuals, colleagues and patients. Broad evidence confirms that the effects of the othering process are profound and far-reaching in nursing practice and across the profession. As a result, othering negatively affects patient care as well as inter-professional (e.g. nurse-physician) and intra-professional (e.g. nurse-nurse) relationships.

4.2.2 | Further research

In a summarizing statement regarding the means by which the nursing profession could possibly evolve to meet the needs of diverse populations Anderson (2004) has suggested that exclusionary social practices could potentially be obviated by fomenting a culture-wide "paradigmatic shift" toward inclusionary thinking (p. 14). Even in light of Canales' (2010) unique formulations for disengaging social exclusion through Inclusionary othering, questions remain regarding the means by which a "paradigmatic shift" toward inclusion, as suggested by Anderson (2004), is to be effectuated in nursing practice. Numerous sources have called for broad-ranging nursing studies investigating the mechanisms by which dominant social standards are used to formulate fixed gender and racial categories in nursing, which facilitate othering and related exclusionary processes, such as marginalization (Lynam, Browne, Kirkham, & Anderson, 2007; Meleis & Im, 1999; Tang & Browne, 2008). Indeed, further investigations are needed to establish a knowledge base regarding the operational elements of othering and an accurate articulation of the way "the other" is generated in clinical and educational settings. Future research might also include investigations into the role of the nursing profession itself and how nursing practice situations affect the pre-existing conditions conducive to othering (i.e. the antecedents). In addition, researchers could consider exploring and empirically testing theory-based interventions aimed at disrupting the attributes or essential contributors to othering, such as differentiation and exclusion.

4.2.3 | Alternatives to othering

Ultimately, the generative purpose of our concept analysis was to first offer a conceptual basis for understanding how the othering process becomes operable in nursing and then work to investigate the practical and functional measures the nursing profession can take to disrupt exclusionary social processes and their negative consequences. For this reason and in consideration for what our analytical findings have revealed, we believe it is worth emphasizing the

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potential of alternative inclusionary practices that have already been formulated and put into action as countermeasures to the exclusionary outcomes normally associated with othering. Specifically, our analysis has referenced Canales' (2010) Inclusionary othering, along with the related concepts of role-taking and world-travelling, as potential guides for thinking about alternative approaches to nursing practice and collegial engagement based on inclusionary strategies designed to disrupt the potentially exclusionary outcomes of the othering process (Burbank & Martins, 2010; Lugones, 1987; Phillips & Peterson, 2005).

Outsider within

In making a broader multi-disciplinary survey of constructs that work to disable and/or disrupt the othering process, we find that the work of social theorist/African American scholar Patricia Hill Collins (1986) stands out as exemplary in this regard. Guided by Black feminist literature sources, Collins has formulated a uniquely holistic approach for theorizing the many ways othering may offer a complexity of outcomes. Herein, Collins (1986) has developed an explanatory "outsider within" model illustrating how marginalized individuals use their dominantly assigned role of the excluded "objectified other" to construct self-identity, self-valuation and a uniquely informed, albeit "outsider's" perspective of the dominant culture (p. 18). Armed with a keen sense of self, coupled with a unique perspective on how the dominant culture has subjugated them, these "outsider within"/marginalized individuals, "may reveal aspects of reality obscured by more orthodox approaches" (Collins, 1986, p. 15).

In granting these uniquely informed marginalized individuals the descriptive title of "outsider within", Collins (1986) demonstrates how the distinctive status of an outsider endows and empowers an individual with an informed outside-to-inside perspective of the functional social aspects inherent to and "within" the dominant culture. In this way, this specially informed "outsider within" worldview simultaneously explains the status and experience of "the other", while shedding light on the motives of the dominant force that has relegated "the other" to the margins of society and culture. As described, Collins' (1986) unique reformulation of "the other" into the "outsider within" has the potential to inform a broad range of research approaches about the methods by which complex exclusionary social processes can be examined from multiple perspectives and how positive and effective responses could be designed to disrupt the negative effects of exclusion.

It is clearly evident that conceptual strategies such as Collins' (1986) "outsider within", along with Canales' (2000) "inclusionary othering", have much to inform the nursing profession regarding the negative trajectory of the othering process and the possible ways exclusionary practices can be disengaged, while simultaneously empowering inclusionary strategies. As social constructs specifically designed to be antithetical to exclusion, the "outsider within" and "inclusionary othering" formulations help guide us toward ways to re-think and re-formulate conceptualizations for new approaches to nursing practice and collegial engagement, which emphasize social processes that support inclusion, while de-emphasizing and disengaging those processes, such as othering, that generate interpersonal exclusion. And indeed, in Canales' (2000) and Collins' (1986) conceptual frameworks, the trajectory of the othering process is not only disrupted, it is made antithetical to itself and disempowered. Herein, we see the potential for alternatives to the othering process in the form of nursing interventions, which are designed to empower the "outsider within" characteristics of patients and nursing colleagues in the interest of creating inclusionary social outcomes.

This work offers a conceptual foundation for considering how othering emerges in the nursing context. Hence, this study is limited in that empirical evidence of othering in nursing practice is neither measured nor addressed. In addition, the authors understand that the experience of being engaged in the phenomenon of othering is highly dependent on context and has a range of epistemological and ontological consequences for the individuals and groups involved. Unfortunately, an accounting for this range of consequences and the implications for the nursing profession are beyond the scope of this study.

In closing we present a brief, yet highly germane excerpt from the writings of literary theorist Edward Said, who over the course of his life and career ardently worked to defend individuals subjected to the process of othering:

> *It is more rewarding —and more difficult—to think concretely and sympathetically, contrapuntally, about others than only about "us". But this also means not trying to rule others, not trying classify them or put them in hierarchies… (Said, 1993, p. 336).*

Hence, in considering Said's insights and applying them to the nursing profession, it becomes evident that the necessary task for nursing is to develop knowledge to support an inclusionary practice, where the many interpersonal differences that emerge amongst diverse individuals are used to strengthen relationships and improve patient care.

CONFLICTS OF INTEREST

No conflict of interest has been declared by the authors.

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ORIGINAL ARTICLE

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Race, Difference and Power: Recursions of Coloniality in Work and Organizations

You people: Membership categorization and situated interactional othering in BigBank

Stephen Fox[1] | Amie Ramanath[2] | Elaine Swan[3]

[1]Queen Mary University of London, London, UK

[2]Independent Scholar

[3]University of Sussex Business School, Brighton, UK

Correspondence
Elaine Swan, University of Sussex Business School, Brighton, UK.
Email: e.swan@sussex.ac.uk

Abstract

This paper offers an ethnomethodological membership categorization analysis (MCA) of an episode of argumentative talk in a bank, between a recent Indian migrant and her white British area manager. MCA examines how members use categorizations in the course of their everyday practical activities including workplace meetings. Our analysis shows how the "interactional trouble" between an employee and manager leads to the manager racially Othering the employee by invoking attributes resonant with what researchers call coloniality. Although theories of everyday racism and micro-aggression focus on everyday interactions, attention is not usually given to the moment-by-moment, turn-by-turn interactions and racial categorizations. In contrast, the MCA of our case study enables us to explicate the complexities of racializing and re-colonizing work in specific organizational encounters. Racist interactions in organizations are complex, contestable, and draw on various shared categories, resources, and knowledges deployed to achieve situated institutional aims. In our in-depth, close analysis of a relatively short interaction, we are able to reveal the institutional, gendered, racial, and colonial categories, and institutional and colonial devices that were made relevant; enabling us to explicate how racism works in the organizational every day. Studies of racist interactions stress there are specificities to the categories mobilized in organizational settings for

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example, parents, neighbors, race, and ethnicity and therefore the forms of racism produced. Our article contributes to studies of everyday racism in the workplace by showing the specific categories and devices—such as English, Indian, English Economy—mobilized turn-by-turn which led to a racially minoritized member of staff being interactionally Othered by the white manager in ways which not only does interpersonal harm but leads to her exclusion and dehumanization. We show how ethnomethodology and MCA are very useful, but somewhat neglected approaches, for learning about racism, coloniality, and gender in mundane, everyday workplace interactions.

KEYWORDS
ethnomethodology, membership categorization analysis, Othering, race, racism

1 | INTRODUCTION

Our article offers an ethnomethodological membership categorization analysis (MCA) of an episode of argumentative talk in a bank, between a recent Indian migrant and her white British area manager. Through the MCA analysis, we are able to show how our case study of a short interaction, displays the complex intersections of racism, coloniality, and "interactional Othering" in a meeting. We detail how a range of categories—institutional, gendered, racial, and colonial- and institutional and colonial devices—are mobilized in the encounter in the bank. MCA is a useful, and somewhat neglected approach for learning about racism, colonialism, and gender in workplace interactions. The contribution of the paper is its articulation of how racism works in the organizational everyday, showing how Jack the "boss" deploys institutional stereotypes in an institutional context for institutional aims. Racist encounters are complex and contestable and also situated. In our analysis we show how Jack mobilizes racist stereotypes that are part of the specific context and wider operations of racism and coloniality in contemporary Britain.

The editors of the special issue argue that we need to turn to theories of coloniality to understand how our categories of thought and analysis came to be and continue not only to shape why relations of racial and gendered domination "emerge and endure in work and organization", but also how we study these (Greedharry et al., 2020; limki, 2018, p. 328). Our article builds on this argument, although taking it into a different academic trajectory, by bringing an ethnomethodological approach to categories and racial categorization—membership categorization analysis (MCA), together with Rawls and David (2005)'s concept of "situated interactional Othering" and postcolonial theories of British coloniality (Hesse & Sayyid, 2006; Tyler, 2012). Our focus is a consequential meeting within a branch of a British bank, we call BigBank, between Habeeba, a recent Indian migrant and her white manager, Jack. MCA examines how we categorize each other and interpret and assign meaning to actions, and use these categorizations to describe, argue, judge, and infer for particular local ends (Hester & Hester, 2010; Sacks, 1992). Situated interactional Othering denotes a practice of bringing in narrative interpretations or attributions of motivation to explain "difference" in response to "interactional troubles" and which lead to stigmatization and exclusion (Rawls & David, 2005).

We show how MCA enables us to examine members' categorization work in the meeting and how racial Othering developed during the course of interaction, and reached the nadir when Habeeba, was racially Othered by Jack in

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ways which excluded her from the interaction. Whereas theories of coloniality stress the ontological and epistemological politics of modernity's categories of thought, MCA studies the categorical and sequential dimensions of social life close-up (Hester & Hester, 2010). Categories are not invented each time they are invoked, but what they mean is relative to the particular context and local interactional work, in this case a conflictual meeting in a British bank (Hester & Hester, 2012). Categorization, as theories of race and coloniality also argue, is not neutral. In MCA, categorizations matter because they describe and evaluate according to normative assumptions and judgments (Whittle & Mueller, 2020).

Ethnomethodology (EM) enables situated racial Othering to be studied closely, turn-by-turn, moment-by-moment, in naturally occurring interactions like meetings in workplaces. Although there are distinctions between critical race theory and EM, our approach aligns with theorists of racism who insist that social interaction is “a primary mechanism” through which domination, exclusion, and possibilities for resistance are reproduced (Essed, 1991, 2002; Schwalbe, 2000; Schwalbe et al., 2000). Our focus resonates with studies of everyday racisms and micro-aggressions in organizations, a key aim of which, evident in the call for papers, is to make racializations and racisms more visible (Applebaum, 2018; Essed, 1991, p. 288, 2002).

Racist micro-aggressions and everyday racisms seem “minor and inconsequential” but “manifest a pattern that is relentless and repetitive and that has harmful effects over time”, a view shared by Rawls across her body of work on race (Applebaum, 2018, p. 133). The concept of everyday racism connects structural and “ideological dimensions of racism with daily attitudes and interprets the reproduction of racism in terms of the experiences of it in everyday life” (Essed, 1991, p. 3). The point here is that wider histories and contexts, including relations of coloniality, and in the case of our paper, the colonial histories between Britain and India are relevant. For MCA, what racialized and gendered categories mean is an “in-situ empirical matter” and they are “inference-rich” that is, “part of the stock of knowledge and reasoning procedures that constitute the culture of a society or a social group” (Sacks, 1992; Schegloff, 2007; Whittle & Mueller, 2020, p. 338).

We argue that the study of situated interactions is critical: first, because “inequality requires attention to the processes that produce and perpetuate it” (Schwalbe et al., 2000, p. 420). Secondly, research is needed that does not reify “matters that are typically defined as ‘structural’” such as organizations, institutions, and systems (Schwalbe et al., 2000, p. 420). An ethnomethodological approach can show the “temporal and situated processes by which race and racism are constructed and put to work, both in developing social policies, institutions, and agendas and at the level of everyday experience and interaction”, through looking at talk turn-by-turn and the categories in its use (Durrheim et al., 2015, p. 86).

What's significant for our discussion on race is that ethnomethodology (EM) and related approaches—such as conversational analysis (CA) and membership category analysis (MCA)—have tenets which challenge other forms of sociological thinking (Garfinkel, 1967, 1986). Broadly speaking, EM, CA, and MCA involve paying close attention to mundane and everyday practices, like everyday racism, because the aim of EM and its offshoots, is the “study of social order at its point of production” (Whitehead, 2011, p. 5). Hence, EM's radicalism is in privileging participants' everyday categories which EM observes and analyses (over researchers' theoretical concepts/categories). The social organization of race, class, and gender are “demonstrated as arising in and from interactions between people” (Dingwall in Hansen, 2005; Rawls & Duck, 2020; Shrikant, 2021; Vom Lehn, 2016, p. 7; Whitehead, 2009). Tracing members' categorizations enables scholars to examine how racisms—everyday racism, new racism, institutional racism, tacit racism, and coloniality—are enacted and institutionalized in interactions, including workplace talk (Rawls & Duck, 2020; Stokoe & Edwards, 2007; Whitehead, 2009). Unlike discourse studies of race talk (for instance, Van den Berg et al., 2004), the focus is on how social order, “category systems” and “the incarnation of social structure” are assembled in day-to-day interactions, and how categories, as used, organize social action in talk and text (Hester & Eglin, 1997, p. 154; Housley et al. 2017; Whitehead, 2009).

In doing ethnomethodologically informed analysis, we extend organizational studies of race, and research on everyday racism, through a perspective which shows how “bigger issues” can be examined through mundane practices in the workplace (Zimmerman, 2005). Furthermore, we continue a significant strand in ethnomethodological,

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MCA, and CA studies of race which has seldom been discussed in this journal. Drawing on these enable us to detail the resources participants draw upon during racist interactions "on the ground" and make sense of organizationally situated resources shared by the participants. Our close-up MCA teaches us about the specific categories and devices that make up forms of racism, and how these are deployed in specific organizational contexts for particular institutional aims. In showing how racisms happen in situ through mundane, everyday organizational practices, we display the complex intersections of racism, coloniality, and interactional Othering. Our article extends current thinking on how racisms are linked to organizational logics and wider histories and manifestations of coloniality in the UK, and points to ways we can enact anti-racism in our research and workplaces.

2 | ETHNOMETHODOLOGY, RACE, AND GENDER: A LITERATURE REVIEW

2.1 | Brief history of Ethnomethodology's engagement with race and ethnicity

The early work of the originator of ethnomethodology, Harold Garfinkel, focused on racial and gender inequality (1940, 1949, 1967) but his interest in race and social justice has been overlooked to a large degree until recently (Doubt, 1989; Rawls, 2002, 2013; Rawls & Duck, 2020; Turowetz & Rawls, 2019). His research on gender has been more well-known for some time. But Garfinkel's first publication as early as 1940 was about race: a short story called *Color Trouble* based on the racial discrimination experienced by an African–American woman which he observed on a bus. Keith Doubt argues that this story presages the tenets of EM and “speaks clearly and concisely to the issue of racism and the moral limits of social convention” (1989, p. 260).

Garfinkel's masters' thesis of 1942 was on “Inter- and Intra-Racial Homicide”, later published in *Social Forces* (1949) and focused on how courtroom outcomes in murder trials were based on racialized accounts produced by judges, prosecutors, defense lawyers, and witnesses (Rawls, 2013). His Ph.D. research moved to the topic of Jewish students and social exclusion. Rawls (2013) who—working with him before his death in 2011—has edited several of Garfinkel's unpublished early writings into book form (Garfinkel, 2002; Garfinkel et al., 2006; Garfinkel & Rawls, 2015) and reminds us that Garfinkel, as a Jew in the 1940s, was identified as a minority scholar and not considered white, and that Garfinkel was firmly committed to questions of morality and justice. Countering claims that EM is not concerned with racism or sexism, Jason Turowetz and Rawls argue that “ethnomethodology was from the beginning engaged with questions of social justice: power, privilege and the violence they do” (2019, p. 21). In their view, Garfinkel's research reveals how racialized and minoritized groups encounter “interactional troubles” underpinned by “durable patterns of social inequality” (p. 21).

2.2 | Ethnomethodology, conversational analysis, race, gender, and the everyday

In the present journal, EM is mainly known through the work of Candace West and Don H. Zimmerman's studies on gendering (1987). Outside organizational studies, feminists have taken up EM, MCA, and CA to analyze gender as an ongoing accomplishment, often through talk (see for instance the work of Dorothy Smith, Elizabeth Stokoe, Candace West; Celia Kitzinger; and Sue Wilkinson). Stokoe has a body of work using CA and MCA, to examine how “everyday notions of gender are taken up, reformulated, or resisted, in turns of talk” (Stokoe, 2006, p. 467).

In organization studies, EM analysis of race and racism have been neglected even though EM studies on race in organizational contexts are well developed. Within MCA there has been a sustained interest in race and racial categorization, for instance Rod Watson's body of work has been germinal to the development of MCA and long been concerned with racialized categories (1976, 1978, 2015). His 1976 paper explores the language of racial discrimination and his 1978 paper examines racist talk in a phone call to a suicide prevention center in a British city. Watson's analysis is particularly useful to our paper in that he examines “the apportionment of blame or responsibility” by

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the caller, through ways of categorizing groups of people, and "membership categorization devices", such as "black people" and "white people" and "the Catholics" and "the Protestants" (1978, p. 105).

Other MCA and CA studies have examined race and ethnicity in various organizational contexts from schools, police stations, community meetings, neighborhood resolution, anti-racist training, organizational meetings (Day, 1999; Hansen, 2005; Stokoe & Edwards, 2007; Whitehead, 2009; Kitzinger, 2009). Stokoe and Edwards (2007), provide a CA approach to racial insults and abuse in telephone calls to British neighborhood mediation centers and police interviews with suspects in neighborhood crimes. Stokoe and Edwards' key focus is how racist insults are produced, conventionally designed, and responded to by recipients, and what sorts of concepts about race are constructed through the insults and responses.

The main project across these CA and MCA studies is to show how race and ethnicity are produced *through* interaction, in naturally occurring real life situations. MCA focuses on ethnic or racial self-categorization; the ascription of racial/ethnic identities; and resistance to such racial categorizations (Day, 1999). What's critical to MCA is that "categorization using race/ethnicity is a means of identification but also a resource used in situ to accomplish social actions such as "conveying expertise; building a complaint; negotiating an identity; or describing and accounting for other people's behavior" (Wilkinson, 2011, p. 344). In an influential MCA-based article on an inter-racial public meeting about the design of a school in New York, Hansen (2005) argues that "there is a paucity of scholarship that expressly considers how ethnicity is utilized by participants as a resource in conducting the business of … social interaction" (2005, p. 63). Hence, MCA examines when racialized and ethnicized categorizations become relevant for members and how they are mobilized as resources to do specific interactional work (Hansen, 2005; Whitehead, 2012).

Researchers also combine EM approaches with other perspectives to examine race and racism. Kevin Whitehead (inter alia, 2009, 2011, 2015; Durrheim et al., 2015) working in a South African racial context, melds EM, MCA, and CA with discursive psychology to study interactional processes through which prejudice and racism are constructed and contested across different encounters including radio talk programmes and anti-racist training. His extensive body of work underlines how racial categories, and the social organization of race itself, are reproduced in interaction. For Whitehead (2009), EM has significant analytic value in that it investigates how racial categories reproduce the category system through which the uneven distribution of economic and social resources is assembled. Racist discourse depends upon racial categorizations.

2.3 | Situated interactional othering

Other studies, such as those by Rawls and colleagues, combine ethnographic and EM analyses to examine racism, and interactional trouble related to race and Othering. Rawls and colleagues' body of work is underlined by a commitment to Garfinkel's (1963, 1967) understanding of Trust Conditions, an implicit social contract, in "which both trust and reciprocity are requirements of situated practices" regardless of personal preference and demographic identities (Rawls & David, 2005, p. 471, capitals in the original). What's key to this view, is that in multicultural societies, trust is "no longer an attitude toward persons, but a necessary shared commitment to and competence with practice" (Rawls, 2016, p. 82). Inequalities patterned by race, gender, and other stigmatized categories lead to interactional troubles and "in the absence of successful reparative efforts…interactions break down", and "self and sense-making fail" (Turowetz & Rawls, 2019, p. 5; Rawls & Duck, 2020, p. 246). As a result, ethnomethodologists such as Rawls and colleagues are interested in documenting "the trouble that inequality produces in detail" (Turowetz & Rawls, 2019, p. 4).

In this vein, Rawls et al. (2018) use video data to show how an interaction between two white police officers and a black male citizen culminated in an assault on and arrest of the innocent black man. Their analysis exposes how interactional aspects of racism are "routine occupational practices" in the police. They underline how "troubles" in interaction, especially "misalignment" between kinds of talk, failures of "reciprocity", and racist remarks led to violent assault by the white police and wrongful arrest of the black man.

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While this article makes a major contribution to studies of racism, our study here is more informed by Rawls and David's (2005) analysis of situated racial Othering. Their ethnographically informed EM study focuses on how talk in a Detroit convenience shop—between an African–American customer and an Arab–American shop-keeper—breaks down mainly due to the former's Othering of the latter, based on what Rawls and David (2005, p. 482) call a "racialized 'you people' narrative". As they write: "They go from mutual engagement, in the first lines, to almost physically coming to blows, in a matter of seconds" (2005, p. 482).

Unlike other theoretical concepts of Othering, Rawls and David's understanding is that "situated interactional Othering" is not simply a "condition of demographic, or belief based exclusion but rather something that happens to people…in interaction" (p. 472). Situated interactional Othering is a response to *interactional troubles* during the enactment of practices, such as asking for change as in their example. More specifically, someone is Othered when they are narrated in talk as "not being committed to the same practices, not giving someone the benefit of the doubt, not being sufficiently competent to perform in the practice" (p. 473). As they put it, "Othering…originates with problems in the orientation toward, or the production of, practices" (p. 473).

In their view, it is "essential that no one be 'Othered' in a "context of practice"—such as service encounters in shops, or meetings in the workplace—because "the process of 'Othering' destroys this foundation of trust" (p. 470–1). Their argument rests on their view that in contemporary multi-racial and globalized society, shared practices and not shared beliefs are the ones that make mutual understanding possible in "contexts of diversity" (p. 489).

Situated interactional Othering occurs when interactions are breaking down and actors import an external narrative, statement of belief, or attribution of motivation to explain the interactional troubles perceived to be caused by difference. In this view, narratives and belief statements are "a specialized form of social practice" which work retrospectively to account for something or someone rather than prospectively repair interactional troubles (Rawls & David, 2005). In their study, the narrative takes the form of a racialized "you people" categorization used of the Arab shopkeeper, by a Black African–American customer, to explain what he sees as "deviant" interactional behavior (p. 494). As they explain, "choosing a narrative account that is unknown or offensive to the Other and treating the Other's recipiency of the interpretation as irrelevant, treats the Other as the Object of interpretation rather than as a recipient" (p. 480). Such narratives do not work to repair the interactional trouble and the breakdown in trust, because they are external to the situation, not shared by all members, and drive the Other out of the practice in hand.

What's very specific to their EM understanding is that interactional Othering is about being excluded from interaction, intelligibility, trust, and reciprocity. To be clear, they are not saying that "demographic" Otherness and the stereotypes and exclusions it engenders aren't problems. The categories of race and gender lead to troubles in day-to-day interactions and it is in these that social expectations and order are assembled (Turowetz & Rawls, 2019). In line with theorists of everyday racism, Rawls and David stress that Othering of this interactional kind is not a minor matter as is often assumed by white people but very harmful existentially, economically, and socially for those Othered.

3 | METHODOLOGY

3.1 | Research design

The data we analyze below were collected as part of two ethnographic studies by the second author, an Indian born migrant who has lived in the UK since 2008. The present paper is based on a study in a branch of a bank we call *"ABBB"* (short for "A Branch of Big Bank": a pseudonym). As is often the case with organizational ethnography, the type of access to the organization shapes what can be observed. The researcher was not granted permission to audio-record everyday discussions or meetings within *ABBB* nor interviews with staff but was permitted to take ethnographic fieldnotes at any point. The main source of the data for our discussion is a "transcript", from these

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fieldnotes, of talk-in-interaction from a consequential meeting in the bank prior to a formal inquiry to be held the following day.

For CA, mechanically or digitally recorded data is considered to be the *sine qua non*, but researchers do from time to time use remembered or non-mechanically/digitally recorded noted down examples (Kitzinger, 2008). In a defense of her own use of fieldnotes, Celia Kitzinger argues that the originators of CA—Sacks, Schegloff, Heritage, Lerner, and Jefferson—used fieldnotes; remembered examples; fragments of conversation; even literal notes on the back of an envelope, and all "caught in passing", in their development of CA (Jefferson, 1975 cited Kitzinger, 2008, p. 185).

Our article draws on an EM informed categorical MCA which lends itself to the use of field-notes and interviews. The researcher is an experienced note taker, with skills in transcribing and short-hand, developed through transcribing hours of focus groups for a market research company in India. In this study, she took detailed field-notes with shorthand notations during the meeting in real time and marked the pauses, interruptions, and tonalities as she recalled them, the nuances of which are not part of our analysis here.

We present a "single case analysis" of a particular episode of argumentative interaction within the branch. In much qualitative research, scholars argue "depth" is the goal of research—and things do not have to be "generalizable" or even "ubiquitous" to be important—a phenomenon can be important simply because it happened. Within EM/CA/MCA, "single case analysis" involves "the resources of past work on a range of phenomena and organizational domains in talk-in-interaction are brought to bear on the analytic explication of a single fragment of talk" (Schegloff, 1987, p. 101). Conversational data and perhaps related interactional practices—through descriptions of, or notes on, posture, movements, facial expression, etc.—are taken from a single interactional context and subjected to detailed examination (Donald, 2018).

Some CA scholars are averse to single case analyses preferring to seek *collections* of instances to describe a single phenomenon. But over 40 years, there have been many examples of single cases in EM and CA, including in Sacks's (1992) own work (for other examples, see Mehan & Wood, 1975; Schegloff, 1987; Sudnow, 1972; Watson, 2015); and multiple arguments for the distinct purpose and contribution of single case analyses (Raymond, 2018; Schegloff, 1987, 1988; Whalen and Whalen, 1988). Emanuel Schegloff insists that a "single case brings with it "internal" evidentiary resources that warrant its being taken very seriously indeed" (1988, 442). Hence, an important purpose of a single case is to reveal the intricacies of a single utterance, speech act, or episode (Hutchby & Wooffitt, 2008; Schegloff, 1987, 1988). Single cases offer a rich understanding of an existing phenomenon within its local context. Watson (2015) is of the strong view that this distinctive context means that the researcher cannot extract the "just this-ness" from the here-and-now to create de-contextualized collections. For Geoffrey Raymond (2018) the contextual specificity of singular sequences of data analysis can sit alongside collections and generalizations in EM.

3.2 | Analytic approach

MCA has been described an "empirically tractable method" for researchers interested in members'—not academics'—categories of gender, race, ethnicity, sexuality, and their relevance to interaction, rather than sequential issues and conducted in a number of organizational contexts (Stokoe, 2012, p. 278). In essence, MCA is an "analytic mentality" and a "collection of observations" rather than a step by step methodology, for describing how members invoke and mobilize categories to organize and understand the social world, and how these are used in positing people, morality, events, and actions (Housley & Fitzgerald, 2015, p. 6; although see Stokoe, 2012).

MCA and CA became branches of ethnomethodology in the late 1960s and early 70s, due to Harvey Sacks collaborating with Garfinkel in EM (notably Garfinkel & Sacks, 1970). Together, they wrote "On Formal Structures of Practical Actions" (1970), an article which brought both approaches together. Sacks invented the analysis of categorizations in his Lectures 1964–72 (Sacks, 1972, 1992, p. 40). Since its origins in Sacks' work (1992), MCA has developed three "distinctive genres" ethnomethodologically informed MCA, focused on categorical analysis; conversational analysis

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informed MCA, examining sequential analysis of talk-in-interaction; and studies which bring categorical and sequential analysis together as they are seen to inform each other in interaction (Hester & Hester, 2010, p. 564; Hester and Eglin, 1997, p. 2). Hence, there is no one monolithic approach to undertaking EM or MCA. Our approach in this article is informed by EM and ethnography. EM scholars have written on the insights ethnography and EM bring to each other (Pollner & Emerson, 2001).

According to Sacks (1972, 1992), membership categories are classifications or social types used as means of describing people and making sense of their local, situational actions. He was interested in examining the principles and methods that people use in selecting categorization for themselves and others on particular occasions; and the consequences of these categorization processes (Housley & Fitzgerald, 2015; Sacks, 1972, 1992). MCA focuses on how people claim, disavow, assign, and reject identity categories; how they describe them—directly, indirectly, and evaluatively—and how and why they become relevant within any particular sequence of social interaction (Housley & Fitzgerald, 2015; Stokoe, 2012).

Categories are seen to be “inference-rich” that is, “the store house and the filing system for the common-sense knowledge that ordinary people...have about what people are like, how they behave, etc.” (Schegloff, 2007, p. 469). Members routinely identify categories but they also ascribe to them certain activities, known as category-bound activities (Sacks, 1992), linked to categories; and category-tied predicates (Watson, 1978), such as attributes, rights, responsibilities, obligations, duties, and knowledges, viewed as “properly” linked to a category (Hester & Eglin, 1997; Jayyusi, 1984; Sacks, 1992). Categories are often collected into membership categorization devices (MCDs), such as “medical occupations” which might include nurses, doctors, auxiliaries, etc; and in ABBB, manager, boss, employee, customer, and director, were assembled under the MCD bank, all of which carried expectable rights, obligations, and activities (Whittle, 2017). MCA analyses how categories are collected into MCDs and tied to predicates occasioned in situ (Watson, 2015). MCA scholars note that speakers often categorize themselves and/or others implicitly through descriptions and category-resonance rather than explicit category labels (Hansen, 2005; Hester & Eglin, 1997; Sacks, 1992). The meanings of categories and MCDs are relative to the local social context as accomplished and oriented to by members and analyzed for how they are made relevant and recognizable to members in their talk (Hester & Hester, 2010).

What's critical to MCA is that the categorizing of members by members is usually more than just description. Categories and MCDs, are “interactionally deployed to perform social actions in formulating locations, doing accusations, making excuses, allocating blame, finding a motive, telling a story and so on” (Eglin & Hester, 2006, p. 9). And this is the case when members racially categorize themselves or others, as in our study: race and ethnicity are not just identifications but resources put to work (Hansen, 2005; Whitehead, 2012).

Finally, a brief point on ethics: our case entails discussing misdeeds in selling bank products which were illegal at the time and raised ethical questions for us in our analysis and writing. But it should be noted that the fieldworker obtained informed consent from participants at each meeting and subsequently anonymized all names. Furthermore, the meeting took place some years ago. Finally, many financial institutions in the UK, US, and Australia were found to have been mis-selling, and as a result, it is now understood as a sector wide problem and a system in which employees are implicated, as we will see in the data below as individual face tensions in if and how to follow and not follow policies.

3.3 | Research context

The personal banking team in Mishti's branch reported to Jack, the area manager for *BigBank's* personal-banking services. In an interview with the researcher, Mishti described him as “her senior”. Mishti managed the branch staff but left most of the management of the personal bankers to Jack, and his office was in Mishti's branch.

On the day of the meeting, the researcher arrived at the branch to find a tense atmosphere. Throughout that day she heard rumors and snippets of information. Someone at another branch had been found to have been “mis-selling”

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the bank's *BetterLife* policy. *BigBank* had launched an investigation and an audit trail had revealed that many of its customers' files lacked the necessary documents to prove the customer wished to invest in the plan. The audit found that one of the "personal-banking team" in Mishti's branch—"Habeeba"—did not have customer signatures for most of the payments into the *BetterLife* plan that she had arranged. During the day the researcher came to understand that the rule was: personal bankers, dealing with clients by phone, *should not* immediately transfer the client to the new policy and take an immediate payment, even if the client said on the phone that they should. Although the client could—and often did—verbally agree by phone to purchase the new policy—and this was legally binding—*BigBank's* formal policy was that personal bankers should *not* take the money straight away.

BigBank's senior management had arranged for an internal inquiry, with a hearing to take place at the bank headquarters, with Habeeba being the first person to be interviewed by senior managers. Jack would be interviewed at a later date. The plan was to hold an evening meeting of the personal banking team after the branch closed. The other personal bankers had been discussing the hearing and advising Habeeba on how to make her defense. It appeared that following Jack's instructions, Habeeba spoke with clients by phone informing them about the new policy *BetterLife* and encouraged them to "invest" money into it. Once they had agreed, over the phone, she immediately set up the payments so that money left the customer's account right away.

3.4 | Findings and analysis

Once the branch was closed for the day, at the evening meeting Jack and Mishti were present, along with the personal-banking team: Habeeba, Sheri, Neha, Ali, Adi, Kunal, and Dave. The personal banking team, except Dave a white British man, were all of Indian heritage—some were second generation British Indian, and others international students who had obtained a job in the UK on a visa.

At the start of the meeting, Habeeba looked distraught, slumped over the table, head in her hands. The young women, Sheri and Neha seated on either side, rubbing her back gently. Ali, Adi, and Kunal seemed uncomfortable, their jackets slung over chairs. Jack was leaning against the window. Mishti made a quick phone call, ordering "sweet hot tea". Mishti kept looking around impatiently, glancing at Jack and Dave who were whispering.

The conversation goes as follows:

Suddenly, Habeeba drained her glass of water and says:

01 H: I was new. It wasn't my fault. I was new. I was new (pause). I was
02 new. Why am I being punished? Why? Why?

The meeting begins in an emotionally fraught way with Habeeba denying fault, justifying her denial ("I was new"), and asking why she's being punished? In self-ascribing herself as "new", Habeeba invokes the member category of a "novice-employee". Habeeba would have a host of available membership categories she could use to describe herself: for instance in this case—personal banker, woman, Indian. But not all membership categories are relevant to accomplish the interactional work needed, which for Habeeba, is formulating an argument (Wilkinson, 2011).

Habeeba is hearably under duress. The four-fold repetition of "I was new" displays Habeeba's belief that in being new she could not possibly be at fault, so should not be punished. Thus, she disclaims responsibility. Whether this reasoning will or should be acceptable becomes one of the main points of argument in the meeting and shortly she will add further reasons.

In assigning herself the label 'new', she begins to imply the kinds of motives, entitlements, obligations, activities, and knowledge—"category predicates"—that can conventionally be imputed to a novice-employee (Watson, 1978). This category enables her to formulate a reason why she is not blameworthy (Watson, 1978). In particular, she invokes a "category-bound entitlement" that she is not responsible for not having a specific form of knowledge, so therefore may claim that as a novice-employee she cannot be at fault (Watson, 1978). As the argument unfolds, we

will see how Habeeba and Jack both invoke and develop other related categories, like boss, manager, and even the English economy. They go on to suggest, explicitly or implicitly, the "proper" or "expectable" actions and activities that can be inferred to these type of identities.

In clearly excusing herself of fault from the outset, prior to even having been asked for her account, and stacking a claim to being blame free, Habeeba can be heard to be creating "interactional trouble" for Jack and Mishti (Rawls & David, 2005). By denying the fault she opens up the possibility that someone else may be at fault. Possibly they are in the room.

Neither Jack nor Mishti respond to Habeeba's question (why am I being punished?), rather, Mishti invites Habeeba to inform the meeting about what happened:

03 M: Why don't you tell us what happened? From the start?

In saying this, Mishti gives Habeeba "the floor" encouraging her to explain what happened, implying that what Habeeba has said so far is not sufficient. Sacks (1992) notes, those who go first in a dispute are generally in a weaker position than those who get to go second. This is because those who go second can simply attack the position of the person who goes first without outlining their own position:

> Going first means having to put your opinion on the line, whereas going second means being able to argue merely by challenging your opponent to expand on or account for his or her claims (Hutchby, 1996, p. 497).

Hutchby insists that institutional settings and discourses shape the unfolding of arguments and distribute conversational resources asymmetrically by role, allocating some participants' differential interactional effects. These points will soon become apparent in the meeting.

Habeeba continues by providing her account of what happened and how it happened. She adds several assertions.

04 H: I had barely finished my training and Jack
05 ((finger pointed at Jack who is leaning against the window))
06 asked me to bring in new customers for BetterLife. I asked
07 him about the protocol, reminded him that that's what we are
08 taught (pause) that we are not supposed to divert any money to
09 anything without the customer's signature. And what did he
10 say? What did he say? ((imitates his deep voice))
11 "It's fine. The rules are not written in stone. They are only
12 guidelines. Just do what I say, love, I know what's right."
13 ((she slams her hand on the table))
14 Obviously you don't know what's right. This. Is. All. Your
15 fault. All. Your. Fault. And who gets the blame? Me (pause)
16 That's who. Now I am going to be fired, you (pause) you (pause) basta

She reaffirms her self-categorization of her novice-employee status by adding that she had "barely finished her training" (L4) when Jack asked her to "bring in new customers for BetterLife". At L5, she directly states Jack is the source of the problem that she is in (finger pointed at Jack who is leaning against the window). L6–9 she stresses that she asked him about the protocol, taught in training, claiming she reminded him: "what we are taught" (specifying "that we are not supposed to divert any money to anything without the customer's signature" L8–9). Here Habeeba makes institutional roles relevant, positioning herself as novice-employee and Jack as her "boss" who can "tell her what to do".

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At L11–12, she imitates his voice and his response through reported speech. Studies show that reported speech—"reporting, directly and indirectly, the words of other people", gives "veracity and authenticity to a descriptive account" by suggesting that the speaker "is simply voicing the words of another" (Stokoe & Edwards, 2007, p. 338–339). Reported direct and indirect speech serve different functions such as giving evidence for a "claim being made" or even "dramatizing a point" (Buttny, 1997, p. 478). They are not neutral but construct an evaluation of the event and people involved. Direct speech appears to reproduce the words of the original source and indirect conveys the content but the not words (Buttny, 1997, p. 478). Direct quotes enable the speaker to draw on the prosody and style of the original speaker. We see this here as Habeeba "voices" Jack directly performing his "voiced persona", framing Jack and his actions. This and helps her to position him as blameworthy, breaking rules and being the "bad" employee, and her the "good" employee (Buttny, 1997, 1998). In doing this, Habeeba seeks to shift the blame to Jack, and her use of reported speech helps makes her claims sound more robust (Buttny, 1997, 1998). She also deploys "indirect reported speech", voicing the policy implicitly to position herself as a new but the "good" employee.

Habeeba's problem, in her own account, is that she is being blamed for doing something she was explicitly directed to do by her manager, and against her own thinking as formed in the training. So having diligently followed his instructions in her own sight she is therefore a "good" novice-employee. Therefore, it is Jack's instructions that are found to be flawed and he must be at fault.

Here, we can see signs of increasing interactional trouble ahead in Habeeba's shift from describing what objectively happened to: (a) repeated rhetorical questions (what did he say?) (L9–10, 15); (b) her imitation of Jack's voice; (c) her slamming her hand on the table; and (d) her blaming Jack directly in very strong terms. Habeeba is hearably indignant that Jack's confident explanation and command have turned out to be so wrong. By imitating his voice and certain ways of speaking (e.g., "Just do what I say, love, I know what's right.") she is upping the ante and daring him to deny her recollection and assertion. She voices his gendered use of "love" on purpose and later in the transcript we see him use this again. In saying "you don't know what's right" (L14), she hearably produces an accusation of managerial incompetence.

For MCA scholars, people in everyday interaction categorize themselves, each other, and each other's actions in moral terms, regardless of whether moral issues are foregrounded, because they make claims about what "things" ought to be like (Jayyusi, 1984). Categories and predicates specify normative, expectable actions, activities, and the morality that are "setting-relevant" for a type, or types, of person such as manager or novice-employee. In making her accusation, Habeeba holds Jack accountable for misdirecting her, a mere novice-employee. She displays "moral work" in addressing his lack of moral responsibility and actions, labels him as being at fault, and therefore responsible for her actions (Jayyusi, 1984). Her accusing, blaming, criticizing and expressing of outrage constitute a series of forms of moral criticism of her manager and as a result, a problem for Mishti, Jack, and the other members of the meeting. Through her categorial actions in front of the whole team, she can be heard to degrade Jack who is in danger of losing face. Her own fear of imminent dismissal is the only mitigation.

Jack does not respond to her at this point; rather, Mishti intervenes:

17 M: (places a hand on Habeeba's arm)
18 M: Ha…bee…ba ((warning tone))
19 Please… Ah, here comes the tea. Drink some.
20 (A girl comes up to the group, tea tray in hand. A kettle and 10 cups are
21 placed on the tray)
22 Thank you.
23 H: (The girl leaves. Mishti pours some tea, adds milk and 3 teaspoons of sugar.
24 She hands the tea to Habeeba.)
25 M: Drink! (Ordering tone)

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At L17-25 Mishti's intervention warns Habeeba of “trouble” and seeks to gain some control with her warning tone, hand gesture, and command to drink the tea. Mishti or indeed anyone else at the meeting could have agreed or disagreed with Habeeba's account, but no-one does. Jack has lost some face and Habeeba remains distraught and is in an increasingly precarious position.

Habeeba does what Mishti tells her to do by drinking the tea. No one speaks. She then continues:

26 H: (Habeeba glares. Sips the tea)
27 H: Sweet. Sweet. Why am I being punished? Why? (Pause). Why? (Pause) I didn't
28 know it would be so (long pause) such a problem. I wondered about
29 it. I thought that we couldn't do such things, you know, just
30 talk to someone on the phone, tell them about our new
31 scheme, and move the money. But Jack, our man-age-er told
32 me that it is okay (sniffs) (long pause) I did not think it would become
33 such a big deal. (Sniffs) (Pause). I trusted Jack. I really
34 trusted him.

L27–34, Habeeba repeats several points she has made previously and her question remains: “Why am I being punished?” The repetitions display that she is trying to hold the line of her argument. Habeeba has already repeated various phrases in L1–2 and 4–16. Now, L27–34, Habeeba returns to and reformulates her account of “what happened”. Having produced at Mishti's request (L4–16) a first stark account, she now, after Mishti's intervention (L17–25), appears to orient to Mishti's warning tone and authoritative commands and produces a second version of her first account (L26-34). She hearbly reformulates it following what MCA calls a “look again” procedure, that is, evaluating the situation with fresh resources (Watson, 1978, p. 109). Habeeba sounds less sure of her account: she uses less definite descriptions, stating she “didn't know it would be … such a problem” (L27-28), and invoking terms like: “I didn't know,” “I wondered,” “I thought” which demonstrate some mitigation of her earlier more definite position (Pomerantz, 1984).

Nevertheless, she reiterates again her reasons for thinking she should not be punished. She remains adamant on this point. Her formulation L29-32, specifies more clearly than before Mishti's intervention, that Jack told her she could move money without a signature, rather than “what we are taught” (L7-08).

Here (L31), Habeeba emphasizes the category of manager in regard to Jack. In doing this she deploys a “standard relational pair” (SRP), namely “manager” and “novice employee” (Sacks, 1972). Standard relational pairs are a class of categories in which two membership categories are commonly paired together. Examples included parent–child, teacher–pupil, doctor–-patient, manager–worker, and as Habeeba frames it, manager–novice-employee. Relational pairs imply rights, duties, and moral obligations in relation to each other. Often one half of the pair has a particular duty of care to the other, as Habeeba implies in her account (L31-34): “But Jack, our man-age-er told me that it is okay … I trusted Jack. I really trusted him.”

Whereas in her first account (L14-16) Habeeba emphasizes that: “obviously you don't know what's right. This. Is. All. Your fault. All. Your. Fault. And who gets the blame? Me”, in her look-again second account (L33-34) she explains “I trusted Jack. I really trusted him”. In shifting from accusing to talking about trusting Jack, Habeeba invokes the category bound predicate that novice-employees should at least be able to trust their manager's word within the workplace. She implies that as an incumbent of the category manager, Jack is conventionally and properly obliged to engage in activities predicated of the category “manager”, such as giving correct information and being trustworthy and responsible.

In L32-33, the transcript suggests that Habeeba is sniffing, perhaps crying, suggesting some “(temporary) interactional incapacity” (Archer & Parry, 2019: 598). At this point Jack responds verbally with a strong accusatory and antagonistic response, verbally ignoring and adding to her distressed emotional state. He is brief:

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35 J: Listen. (Pause) You knew it was wrong and against company
36 protocol. Yes? You could have said no. You didn't. Did you?
37 Did you? (Long pause) So it is your fault. Get it? Can you underst-

Nothing in these three lines acknowledges Habeeba's self-categorization that she was new, a novice fresh out of training, and obliged to take his advice and entitled to trust his answers to her check-up questions. However, in specifying she "could have said no" he implies that someone either suggested or asked her to do something she knew was wrong. But Jack, we find, is using a different category-bound predicate: someone fresh from training who knows the protocol exactly so should be expected to enact the protocol.

Jack's response—"You knew it was wrong and against company protocol"—is strongly worded and works to reformulate what Habeeba has said in L06-12. Jack does not, at this point, accept that he asked her to do anything. When he says: "Listen. You knew it was wrong and against company protocol", he erases any instruction he may have given. In his account, Habeeba simply knew what the protocol said and took the wrong action. She could have said no, but didn't.

As a target of moral criticism, there are various types of responses Jack could make, for instance, giving an account, apology, or admission, or making an outright rejection or denial (Archer & Parry, 2019). But instead, he simply re-formulates Habeeba's account selectively, altering the presumption she was holding on to (that he told her to do it), and undermining her conclusion that it was his fault. He represents a direct challenge to her account and moves the conversation into the opposite direction to Habeeba; that is, he is working toward her guilt and his innocence.

He picks apart her argument by using a sequence of closed form of interrogatives, which allow a constrained "yes" or "no" response at the very most, and are grammatically formatted to prefer a "yes" response (Raymond, 2003). Such questions are "blame-implicative", "a powerful resource often relied upon in the construction of legal argument" which reduce the potential extended replies and have been described as a "coercive" form of questioning (Archer & Parry, 2019, p. 595). Jack's accusatory questions imply Habeeba's guilt and work to seek a confession from her. He does not answer her question about why she is to be punished. But he tries to assign blame through his questions, bypassing her category-bound predicates that she was new therefore sought his advice; and the category-bound predicates and actions that Habeeba ascribed to him as a manager. In producing a series of coercive questions, Jack can thereby be heard to "deflect, neutralize and make redundant" her account (Hester & Hester, 2010, p. 39). He does not address her reproaches of him which could have become the objects of his dispute or moral offense. He uses the accusatory questioning turns to exonerate himself from wrongdoing by portraying her responsibility for the problem, and obscures his own agency.

Jack tries to reject moral criticism by putting the blame on her and getting her to agree to fault without much explanation, all of which inflames the growing lack of interactional trust. His closing comments: "So it is your fault. Get it? Can you underst-" a verdict followed by two sharp questions: the first "Get it?" is followed by "Can you underst" which implies that she probably has not understood, nor cannot. Here, he is turning the tables on Habeeba, using her self-claimed novitiate status to demonstrate her lack of understanding. He comes back to this shortly.

He weakens her claim to the category-tied predicate of a "novice employee" of not knowing how to behave and he asserts strongly that she did know what she was doing was wrong. Ignoring her rights and entitlements as a novice employee, he says she could have said No, implying that novice-employees can say No, and that this responsibility lies as much with a novice-employee as with a manager. This categorical work extends his argument that Habeeba alone should take the blame in the inquiry for the wrong-doing she claims he directed. From here on the meeting becomes more of a tit-for-tat argument with Habeeba responding as follows:

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38 H: My fault? My fault? For trusting my boss? I thought that
39 maybe you (pause) had the power to override the rules. I thought
40 you knew what you were doing. But you just wanted sales to
41 go up! Money! That's all. You don't care about us, your
42 employees. Do you? Money. That's all (pause).

Previously she used the membership category "manager", but now Habeeba responds with a repeated rhetorical question: "My fault? My fault? For trusting my boss?" (L38), referencing the word "boss", inferring a more hierarchical relation (bosses give orders rather than suggestions). This invokes a power relation—not in the sense of a theoretical concept but as a practical matter of fact. One is obliged to do what one's boss instructs. Claiming her category-bound entitlement more strongly here, she states she thought he had the information, rights and responsibilities to override the rules. One category-bound duty of a boss, for Habeeeba, is to give accurate advice/instruction to employees and to take responsibility when it turns out that advice is wrong or if the boss misled her, deliberately or accidently, then surely that boss is responsible for any mistake made as a consequence.

In this excerpt, Habeeba widens her accusation against Jack, explicitly invoking the standardized relational pair—"boss-employee"—to reformulate her claim of him. Instead of just being wrong through incompetence, she now depicts him as not caring: "You don"t care about us, your employees'. Adding: "Money. That's all" (L41-42); stating what she thinks his motive was. In doing so, she produces another moral judgment entailing an evaluation of Jack's conduct as infringing expectations based on a normative assessment of a boss's actions and values. In upgrading her blaming and degradation of Jack, Habeeba hearably judges that his moral standing has diminished further.

"Blamings" can demand a morally loaded response like an admission, account, or apology (Archer & Parry, 2019). But despite Habeeba's accusation, Jack orients back to the topic of money and how the team and she did well by her doing what she did:

43 J: And? We had the best sales for that quarter. Thanks to you.
44 J: (Flashes a smile)
45 And are you forgetting that little. wonderful. thing, called
46 a bonus, that you earned? It was nearly as much as your
47 basic salary!

In essence, he tries to pass the interest in money back to her by imputing her motive and suggesting she flouted the protocol to earn a big bonus and that she and the team benefitted. In so doing, he reformulates her claim that he wanted money to turn it back on her. He does this to continue his narrative that Habeeba needs to take the blame in the inquiry.

Habeeba responds quickly displaying her understanding of the problems with Jack's claim that she sought money.

48 H: A bonus one quarter, and dismissal within 6 months. Great
49 track record for me! Oh!

Jack ignores her with a dismissive 'whatever', treating Habeeba's last remark as of no consequence. He then issues her with a series of commands on how she should present herself at the following day's inquiry with senior managers:

50 J: Whatever. Just say it was your fault, you were new, blah blah blah
51 J: ((in a high pitched tone))
52 (Long pause)
53 J: Make sure you don't blame me. And don't take my name.

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54 They'll think you were just a novice who made a mistake,
55 driven by the need to earn a bonus. You will promise to be a
56 good employee, it won't happen again, blah blah. It's not
57 unheard of, amongst you people.
58 ((smirks and winks at Dave, who winks back))
59 They might feel bad and let you off with a warning
60 ((sniggers))
61 No?

He commands her to 'say it was your fault' at tomorrow's internal inquiry, to explain 'you were new' (L50) and 'make sure you don't blame me'. Jack appears to inhabit the directive boss category given to him by Habeeba (L38) and gives Habeeba his commands: 'Make sure you don't blame me,' 'don't take my name,' (L50-53) projecting 'compliance, deference and obedience', 'second pair parts of commands' (Hester & Hester, 2010, p. 38). He now infers his recognition of the category relationship of boss–employee and that he is in a position to issue these commands, that he has authority over her and that she owes him deference and compliance. He is asserting his right to direct Habeeba as her manager and echoing Habeeba's invocation of the boss category at L 31, 32, 38 but twisting it to his own ends for her to take the sole blame and not mention him.

He suggests the inquiry members will 'think you were just a novice who made a mistake driven by the need to earn a bonus' (L53-54). Here, Jack agrees with her self-ascription of novice-employee but reformulates it with new predicates to the category, which she did not imply. And then, he adds: 'It's not unheard of, amongst you people' (L56-57). The last remark assigns her a new identity: being a member of the category 'You people'; a predicate of which—according to Jack and common knowledge in some bank quarters—is to 'be driven by the need for money'.

Jack does not make explicit what the identity of "you people" is but he is referencing Habeeba, who is a recent Indian migrant. Although he doesn't mention the category of Indian directly, it is hearable that Jack means to infer her race and implicates the other British- and migrant- Indian people in the room. Scholars note that members generally avoid mentioning race or ethnicity directly, by name or label, and instead deploy other resources—associated activities or concerns—to invoke them indexically or imply a racial meaning indirectly, without saying it 'in so many words' (Hansen, 2005; Schegloff, 1996, p. 181; Whitehead, 2009); unless it's a situation when race talk is encouraged such as diversity training (Whitehead, 2009). In this case, the meaning of "you people" as a racial category 'derives its sense from the particular group that is being 'indexed' or 'pointed to' in that particular context' (Whittle, 2017, p. 220; see also McIlvenny, 1996). Additionally, the two white men, Jack and Dave exchange affiliative winks as Jack makes these categorizations.

Jack implies that he and the senior managers share this commonsense racial knowledge of people like Habeeba, as if the categorization is a semi-official, institutionally recognized type of person. At no point in the meeting, has Habeeba assigned herself a category membership of race or gender, or made race a 'relevancy' in her argument. He suggests that her need to get a bonus would not be unheard of, that is, the inquiry members are likely to have come across similar cases, and he says of the inquiry: 'they might feel bad and let you off with a warning'. Here, he tries to provide plausible motives for Habeeba so that she obeys his commands and take the blame.

In her turn, Habeeba repeats her denial and her accusation of him, which he had not acknowledged in his turns, and responds with a verbal and physical counter-attack, making her distress and indignation at his racialized categorization of her in ways that are hearable and visible:

62 H: ((stands up, roughly pushing the chair back))
63 Firstly, it wasn't my fault. It was your call. I did what was
64 asked of me. Like a good employee. Secondly, why shouldn't
65 I blame you? And third, and most important, what do you
66 mean by 'my people'? Huh? Huh?
67 ((aggressive tone))

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There are several parts to her opposition to his remarks: first, a denial of fault in which she re-attributes the blame to Jack, restating the SRP manager/employee and the category-bound assumption that as her manager, it was his call. She insists that in obeying his commands as a manager about the protocol, she behaved as a good employee, so does not need to promise the inquiry that she will be a good employee. Secondly, she resists his command that she should not blame him.

Thirdly, and the 'most important' issue as Habeeba hears it, is Jack's insult 'you people'. She asks a direct question, hearable as an accusation, and a display of her contestation of his categorization: 'what do you mean, huh, huh?' (L66-67). Habeeba can be heard to resist and disrupt his categorization. Because participants know that mentioning race and ethnicity and stereotyping are potentially sensitive, questionable, and negative, Habeeba's interrogative 'what do you mean by 'my people'?' offers Jack the face-saving possibility of denying any racist connotation. But Jack does not accept, as we see in his next moves.

In this next excerpt, we hear him upgrade his racist insult and racially Other her and her colleagues through invoking the category "you people" in relation to the MCD 'English economy'. Jack starts by again showing non-verbal affiliation to the other white man in the room (L68) and continues to try to coerce a confession from her, using the over-familiar form of address, 'love', hearably inappropriate, sexist, and condescending given the nature of the meeting, and his role as 'boss'. It points to the intersections of race and gender in this racist interaction.

68 J: ((smiles slowly, glances at Dave. Dave grins))
69 Come on love, admit it. You wanted money, you did the stupid
70 thing I asked for. You people can be so naïve! You people want
71 to work here, be part of the English economy, then try not to
72 be stupi-

After he calls for her admission (L69), he re-asserts his account of the reasons for her mis-selling: her appetite for money, as she followed his advice. At the same time, he affirms that she did what he told her to do, 'the stupid thing I asked for' (L69-70). Since she is accused by head office of breaching the protocol, Jack has just inferred that he did ask her to do this. This is almost an admission that he had asked her to breach the Bank's protocol as she said earlier (L10-12, L29-34). However, he is more focused on persuading Habeeba that the motive she should admit to, at the inquiry, in doing as he asked, was that she 'wanted money', which he asserts as a predicate of 'you people' (L54-57, L69-70).

He answers her question (L65-66) about what he meant by 'you people', by associating it with further category-bound predicates of stupidity and naivete, adding to his earlier ascription of 'being driven to earn a bonus' (L55). He repeats 'you people' twice here in a confrontational and even threatening manner, even though, or perhaps because, he could see that Habeeba was distressed.

At L71 in his next move, Jack invokes the MCD—'the English economy'—through which he brings forth a category of a social configuration that is, economy, modified by the national or racial category of English. Like other categories, what national and racial identities 'mean', is a members' phenomenon and contextual matter. Given that the racial category of 'Indian' was alluded to in the previous turns, it can be heard here as another category within the device of economy. It is also possible to infer the 'customary reference' of 'English' to refer to white people (Tyler, 2012; Watson, 1978). Scholars note that people of color are more likely to describe themselves, and be categorized as British, a civic identity, rather than English, a racialized or ethnicized one (McCrone, 2006, p. 274). Indeed, some argue that calling oneself English can be heard to be 'tapping into a strain of right-wing sentiment which has chauvinistic overtones, both against 'foreigners' and 'Europe' (McCrone, 2006, p. 274).

Additionally, within this MCD, Jack seems to infer there are two groups—English and Indians—that exist in an adversarial SRP—whereby membership is mutually exclusive and predicates associated with them, oppositional (Jayyusi, 1984). The predicates according to Jack are English—sophisticated and clever—; and Indian—naive and

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stupid. His application of the MCD "English Economy" also provides for the possibility of additional pairs of categories such as English/foreigner, English/Indian, white/brown, and insider/outsider: the latter identities in each pair he implicitly assigns to Habeeba and her peers, and the former to himself. In mobilizing this MCD, he racializes Habeeba and her peers again and casts doubt on her, and her peers' competence and qualification to be a member of the 'English' workforce because they deviate from what he implies are the occupational requirements of those working in the banking sector.

We can see his attack as predicated on his incumbency of directive boss, acting in a predicate bound way, presenting himself as the one who can decide what's right, wrong, and appropriate and competent to adjudicate on race and workplace traits. It is plausible to suggest that Jack is self-categorizing not only as directive boss, but as a white English boss who is entitled to make a racist evaluation of his Indian employees in this way.

Jack is making supposed commonsense knowledge in the bank about racial difference relevant to push his claims that Habeeba doesn't understand the nuances of the workplace and should obey him and take the rap. In so doing, Jack verbally and racially attacks her and the rest of the team, stigmatizing them as mentally deficient and professionally incompetent based on their race. Rather than understand his racist insult as individualized prejudice, MCA encourages us to hear it as relevant and consequential, invoked as a resource to legitimate his actions and denigrate hers, and part of BigBank's institutional categorizations of its Indian workers.

In this paper, we end our analysis at L72 in the transcript, since Habeeba does not speak again. His racial Othering silences her. Jack's attack is followed by a series of instructions from Mishti that Habeeeba take the sole blame at the inquiry and not invoke Jack's name. Jack finishes by telling her she has no proof that he did anything wrong and repeats his Othering narrative, 'You people are so naïve' which he know distressed Habeeba and probably all of the Indians in the room. He then walk-outs unilaterally with Dave, the other white man, withdrawing from the argument, terminating the interaction, and leaving it unresolved. After the inquiry, Habeeba lost her job.

4 | DISCUSSION

We can see from this transcript that Habeeba starts the meeting using the standard relational pair (SRP) of novice-employee and boss/manager. To be a good employee in Habeeba's book means asking your boss for direction and trusting that s/he gives you a good steer, all consistent with a 'hierarchical organization MCD' in which bosses tell novice-employees what to do. Jack appears to be using the MCD of 'flat organizational structure' in which there are 'self-managed employees', who know company policy and follow that, even when directed to do otherwise. Managers just give guidelines. Employees can say no to them.

Jack appears to use the MCD of flat organizational structure strategically during the meeting to discount her argument and to use it against her. But later in the excerpt, Jack orders and commands Habeeba, activities which align with her classification of the MCD hierarchical organization structure and predicates of boss. What's also noticeable, is that during the course of the meeting, as she interacts with Jack, Habeeba gradually enacts the category of the employee who will say 'No' to Jack, her manager as he tries to get her to take the sole blame.

Habeeba consistently invokes the SRP of novice-employee/boss and does not ascribe any demographic categories in making her claims. In Rawls and David's (2005) terms, she treats everyone as populational identities that is, actors defined by mutual participation in a practice, in this case a workplace meeting in a bank. In contrast, Jack shifts from invoking occupational categories—novice-employee—to demographic identity, making race relevant to his argument in ways that can heard as racist. When Habeeba does not follow his commands, he re-categorizes her from being a novice who made a mistake to being an Indian in need of money, a categorization he claims is based on some common place knowledge in the bank. He then invokes the MCD of the English Economy in which stupid Indians/clever English, foreigners/English and outsiders/insiders are collected. At this point, he also performs the predicated actions of hierarchical boss in commanding her to do what he says and take the blame; and evaluating her qualities as

a worker in the MCD of the English economy in a racist way. In selecting a narrative that is hearably racist, and clearly one that she is distressed by, he is claiming the right to make interpretations of her as a manger in BigBank, and that she is not allowed to assess, and that he infers are part of the common place knowledge of the white management echelons (Rawls & David, 2005).

Habeeba has refused to support the narrative that Jack has perpetuated that she take the sole responsibility for the wrong-doing that he has seemingly directed. In Jack's view, she is causing 'interactional trouble' and has become 'accountably Other' because she is not obeying the directions he enacts through the category of manager (Rawls & David, 2005). Jack activates the racist 'narrative account' of 'you people' being stupid and naive, and not competent in the 'English economy' to interpret why she is causing 'interactional trouble'. He knows this is a narrative that she and the others in the room will not share and in invoking it, destroys the last vestiges of Trust Conditions that operated between them.

Othering narratives about groups already exist amongst those with similar beliefs and values, often because of problems with each other historically and then are 'carr[ied] …into interactional situations' (Rawls & David, 2005: p. 489). In this vein, Jack's construction of Habeeba and colleagues reproduces what critical race theorists call coloniality, the 'historic effects of colonial logic' which inform categorizations of race, notions of white Western superiority, and racial hierarchy in the present (Iimki, 2018, p. 327; Tyler, 2012). White peoples' 'sense of superiority that historically has its origins in Empire and images of Empire' and the supposed inferiority of those colonized underpinned the rationale for and expansion of colonialism (Tyler, 2012, p. 429). The non-European is 'designated as lacking rational capacity and moral will, lesser or non-beings, instituted in unresolvable difference' (Iimki, 2018, p. 331). Coloniality underpins how British Asians are seen as racially marked immigrants and cultural outsiders (Hesse & Sayyid, 2006). What's important for Barnor Hesse and Sayyid (2006) is the extensiveness of coloniality, and the erasure of colonial violence and exploitation in white British's talk, thinking, social practices, policies, and forms of governance (Tyler, 2012). Katherine Tyler insists that 'even within mundane and ordinary [interactions]…colonial notions of culture and difference are expressed, articulated and performed that mark off and distinguish the white English Western self from non-English, non-Western, non-white foreign others' and which we see resonances of in Jack's classifications (2012, p. 442). While coloniality may be understood ethnomethodologically as a 'theoretical object'—a researcher's analytic category—and is not invoked at any point by the workers in the bank, this does not mean that its meanings do not influence beliefs and narratives about Indian workers in BigBank.

When Habeeba resists Jack's attempts to take the sole blame, he ups the ante, racially degrading her and her colleagues, applying race, over other categories, as a relevancy to win his argument and denigrate her competence. In doing so, as Iimki writes of the operation of coloniality in the workplace, he positions his Indian colleagues and staff members as ontologically different, in ways resonant with colonial Othering, and which deny her competence and exile her from the practice of the meeting discussion. He displays that he has full authority to do whatever he wants. His power as a manager provides the institutional context which enables Jack to make direct, unmitigated claims about racial difference, which no-one feels they can challenge. This interaction is a warning to the Indian workers in the room that they must do what he asks of them and that if they don't, they can be racially stigmatized, degraded, and made expendable.

What's important to note about the Othering going on here is that it is not simply a case of Jack racially insulting/Othering the Indian workers, although this has harmful effects as the everyday racism literature shows. Situated racial Othering is a 'process of driving someone outside of the practice' as we can see from the silencing of Habeeba (Rawls & David, 2005, p. 490). For Rawls and David, situated interactional Othering means being 'excluded from being human, refused reciprocity and excluded from intelligibility' (2005, p. 494). As they note, descriptions of racial discrimination are often belittled by white people but 'interactional difficulties are not trivial' (p. 494) and lead to 'the exclusion of persons from those *situated interactions* in which the essential economic, political and social transactions take place' (italics in original, Rawls & David, 2005, p.474).

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5 | CONCLUSION

Our article contributes to studies of race, coloniality, and racism in organization studies by bringing EM analyses of race, from Garfinkel onwards, to the readership of the journal and showing how a close-up analysis of workplace interactions can reveal the complexities of racism in mudane meetings in organizations. One key aspect of coloniality is that it refers to racial classification, 'an arrangement of power propagated through a 'cognitive model' that affirms a categorical distinction between Europe and non-Europe' (limki, 2018). For limki, this understanding of the ontological production of gender, sexual, and racial difference legitimizes the subordination, inequality, and exploitation of racial, gender, and sexual Others in work.

Alongside of coloniality theorists, other social scholars of different hues—critical race and EM—are interested in racial categorization and racial formation—how race has been and continues to be made—in order to promote racial justice and equality. But these theories differ in their projects and perspectives. Critical race theory and post/coloniality scholars are often interested in the questions underpinned by researchers' analytical categories, related to the relations between colonial history, racist cultures, global capitalism, and social power relations, such as did 'a category of race facilitate colonialism, or was colonialism instructive in cultivating a concept of race?' (Meer, 2018, p. 1167). In contrast, EM and MCA study members' categories in situ, as an occasioned matter for their situated purposes: categories-in-context (Hester & Hester, 2012). As we have shown, the aim is to examine how members classify persons racially and what people are and do; and importantly, mobilize race and ethnicity as a resource for practical purposes in local interactional contexts (Hansen, 2005; Whitehead, 2009). Such categories are not invented each time relative to a particular local social context as accomplished by participants and draw on local and wider circulating cultural knowledge (Hester & Hester, 2012).

Our article takes the editors' argument about the significance of categorization and the effects of this on the *unfolding* of racialization and the *emergence* of racial inequality but respecifies them through MCA and situated racial Othering (Greedharry et al., 2020; limki, 2018). In this way, we can offer an analysis of a meeting within BigBank which provides a rare insight into specific inter-racial interactions between employees and their managers. Our study works through the turn-by-turn talk and categorizations to explain how Jack makes race relevant for his argument that Habeeba should take the sole blame for the wrong-doing he seems to have directed. Jack does this in his position as manager, invoking the racist 'you people', a stereotype in an institutional context for institutional aims, a form of racism different from how racism happens in other contexts. In so doing, he deploys a racist categorization echoing a coloniality logic of 'racial Others as ontologically different', attributing characteristic to her which he infers is racial common sense in certain quarters of the bank and making Indian, new employee and greedy relevant in these interactions (limki, 2018, p. 327). Through this process, Jack racially Others Habeeba and the other Indian workers in the meeting in ways which dehumanize them and lead to their 'exile' from the interaction (Rawls & David, 2005).

Our literature review and empirical study provide an alternative way of understanding everyday racism which moves away from popular notions of unconscious bias or racist motivation, to analyze how race emerges in situ to accomplish social actions (Whitehead, 2012). This has critical implications for how we understand race but also how we challenge racism in organizations. Finally, we show that an MCA analysis of the granular detail of talk can tell us about what Don Zimmerman describes as the "big" issues, such as power, inequality, racism' and we can add coloniality, and he adds, 'whenever we look at deviance, disability, or the conditions underlying some social problem, we unavoidably encounter the footprints of the ordinary, routine processes of a society' (2005, p. 446, 447). An underutilized approach in organizational studies of racism, MCA reveals how the complexities of racism happen mundanely but with devastating consequences.

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CONFLICT OF INTEREST

The authors declare no conflict of interest.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request from the corresponding author. The data are not publicly available due to privacy or ethical restrictions.

ORCID

Elaine Swan https://orcid.org/0000-0002-4422-807X

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AUTHOR BIOGRAPHIES

Stephen Fox is Professor in Organisational Learning at Queen Mary University of London. His research interests are in ethnomethodological and ethnographic studies of work and organisations.

Amie Ramanath is an HR consultant specialising in employee engagement, learning and development. Her PhD focused on workplace culture and communication in the NHS. As an immigrant herself, matters relating to equality, diversity and inclusion are close to her heart and have been a key focus of her research and career.

Elaine Swan works at Sussex University Business School where she researches feminist and critical race approaches to diversity, therapy culture and food.

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Walking a mile in their patients' shoes: empathy and othering in medical students' education

Johanna Shapiro

Address: Department of Family Medicine, University of California, Irvine – School of Medicine, Irvine, California, USA

Email: Johanna Shapiro - jfshapir@uci.edu

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Abstract

One of the major tasks of medical educators is to help maintain and increase trainee empathy for patients. Yet research suggests that during the course of medical training, empathy in medical students and residents decreases. Various exercises and more comprehensive paradigms have been introduced to promote empathy and other humanistic values, but with inadequate success. This paper argues that the potential for medical education to promote empathy is not easy for two reasons: a) Medical students and residents have complex and mostly unresolved emotional responses to the universal human vulnerability to illness, disability, decay, and ultimately death that they must confront in the process of rendering patient care b) Modernist assumptions about the capacity to protect, control, and restore run deep in institutional cultures of mainstream biomedicine and can create barriers to empathic relationships. In the absence of appropriate discourses about how to emotionally manage distressing aspects of the human condition, it is likely that trainees will resort to coping mechanisms that result in distance and detachment. This paper suggests the need for an epistemological paradigm that helps trainees develop a tolerance for imperfection in self and others; and acceptance of shared emotional vulnerability and suffering while simultaneously honoring the existence of difference. Reducing the sense of anxiety and threat that are now reinforced by the dominant medical discourse in the presence of illness will enable trainees to learn to emotionally contain the suffering of their patients and themselves, thus providing a psychologically sound foundation for the development of true empathy.

Background

When someone is sick, disabled, in pain, hurt, or dying, medicine expects an altruistic impulse from the physician. In other words, the physician must draw closer to the patient, putting the interests of other above those of self, even at some sacrifice to oneself. Scholars have tried to determine what constellation of factors propels certain individuals toward altruistic action [1]. Although the confluence of values, personality, and situation is complex, some researchers have posited an altruism-empathy nexus [2], in which empathy is the underlying motivator and enabling force in altruism. According to this theory, the key ingredient to helping is empathy [3]. Without empathy, social exchange theory, which states benefit must always outweigh cost in any action, takes over [4].

In this sense then, empathy for the patient underlies one of the key professionalism goals of medical education; and as such may be considered a kind of bellwether by which to measure the extent to which the fundamental nature of medical practice is changing. Although Landau [5] contemptuously referred to empathy as "the least" of

medicine's professional virtues, in fact, if figuring out how to bridge the inevitable distance between doctor and patient is at the heart of good doctoring [6], then empathy may be "the most" important. The American Association of Medical Colleges has identified the development and enhancement of empathy in medical students as a key goal [7] and the Accreditation Council for Graduate Medical Education lists empathy as a component of professionalism [8]. The value of empathy is cited in specialty training guidelines [9-12], and is mentioned as important by trainees as well [13].

Although the reduction of empathy to its behavioral components [14,15] has received intense criticism [16-19], because it is more easily observably translated into daily clinical practice than the virtue of altruism, it has garnered much more direct emphasis in medical education. Training programs use various exercises and learning activities, such as being admitted to a hospital [20,21], accompanying patients on medical visits [22], participating in empathy enhancing communication workshops [23], making home visits[24], engaging in dramatic enactments [25], writing first person narratives about patients [26] or cadavers [27] and reading medically related literature and poetry as ways of helping medical students acquire empathy for the experiences of people with illnesses and disabilities [28]. On a broader scale, critical contributions to the art of medicine have been made through theoretical and teaching models such as biospychosocial [29], patient-centered [30] and relationship-centered [31] doctoring, all of which have promotion of empathy among learners and practitioners as a key goal. Narrative medicine [6] has recently provided a way of understanding patient-doctor interaction that develops emotional and cognitive skills of narrative competence, enabling appreciation of story as a way of inspiring more empathic and compassionate action on the part of the physician.

Yet, discouragingly, available evidence indicates that empathy tends to decrease among learners during medical school; and even more so during residency training [32-34]; for a contradictory finding, see [35]. As their education progresses, students become cynical and disillusioned [36-38]. Marcus [39] notes that first year medical students relate strongly to patients, while in the third (clinical) year of medical education, they are motivated to counter-identify with patients, and instead are drawn to the doctors whom they have idealized as healthy, invulnerable, authoritative, skilled, and effective individuals who possess powerful and still somewhat mysterious knowledge and skills [40,41].

What is going wrong? We have brilliantly conceptualized models of doctoring that put empathy, in addition to other crucial humanistic qualities, front and center in their doctrines. We have specific behavioral skill-building exercises that are documented to promote empathy. Yet we do not see the dramatic shifts toward greater empathy that we would expect [42,43]. In part, of course, it is appropriate and desirable that trainees become identified with physicians through the socialization process they undergo. It is also true that students need to curb excessive emotional identification with the patient, so that they are able to achieve clinical empathy by comprehending both the patient's perspective and larger, complementary contexts which may be valuable to the patient in coming to terms with his or her medical predicament [44-46]. Nevertheless, medical education still seems surprisingly ineffective in helping students walk a mile in their patients' shoes, as they are so often enjoined to do.

The remainder of this article suggests that true empathy may be more complicated to cultivate toward patients than initially appears and less susceptible to behaviorally-oriented skills training or rhetorical expostulation. We must excavate more deeply to understand what interferes with learners' impulses and desires to express empathy toward patients, especially when available paradigms apparently encourage them to do so. I posit that ingrained ways of thinking symbolically about illness and health, and therefore about what unites and what separates the ill and the non-ill, create barriers that significantly interfere with the development and expression of empathy. I further argue that to truly enhance students' empathy, medical education will require complementary ways of reflecting and teaching that creatively explore and challenge the nebulous and often frightening borderland between patient and physician [47].

Contamination and othering in relation to health and illness

Despite its pivotal role in medical practice, the impulse to "draw closer," to become engaged and connected with the suffering other, is far from automatic in human nature. In fact, we have an equal, if not stronger, and opposite impulse to draw back, detach, and separate from the contamination of illness [48-50]. This impulse may well be related to fear of our own suffering and death [51], and likely contains an historically important element of self-preservation. If we did not draw back from contagious disease or physical threat, we might easily encourage our own extinction.

Cultural/philosophical components

Yet this response of withdrawal has a strong cultural/philosophical component as well. Eastern philosophical traditions, such as Buddhism and Taoism [52,53], place emphasis on a fundamental unknowability in the universe, the impermanence of all things including the self, recurring cycles of life and death, thus seeing death as part

of life, and the ultimate unity or oneness of self and others. These ancient doctrines, while they do not eliminate the experience suffering or fear of death, mitigate their intensity and balance resistance to death with acceptance and surrender.

By contrast, in the west, the emphasis is on mastery, with the rational mind and intellect viewed as capable of penetrating and solving the mysteries of the world [54]. In the realm of disease, this means that, with the persistent application of logico-scientific investigation, we can vanquish and overcome disease and disability. The Cartesian dualism that characterizes much of western thought defines illness as the opposite of health; and death as the opposite of life. Since health and life are highly desirable, sickness and death become highly undesirable, events to be feared, avoided, or even loathed.

Western cultural/philosophical thought also emphasizes the importance of the individual self, especially as it is distinguished from the other, but as disability [55-57] and feminist [58-60] scholars have pointed out, by and large the valued self is one that is pure, clean, boundaried, and healthy. Thus, on an individual level, each person yearns for a perfectly healthy body immune to fragmentation and corruption [61,62]. Decay, infection, and disease are viewed as potentially engulfing contaminants that represented a fundamental danger to this idealized self [49]. In this way, because ideally desired, health runs the risk of incorporating a moral dimension, and becoming imbued with attributes of goodness.

On the societal level, the desire for a productive, hard-working citizenry also privileges the healthy body as desirable [63]. Illness that is not quickly resolvable is perceived as unruly, out of control, unpredictable, boundary-crossing, and therefore frightening as a social phenomenon that threatens collective stability [48,49,62]. In this view, the role of medicine is to contain and manage the potential chaos of illness from overwhelming the social fabric

However, this healthy and productive self, fantasized by both society and the individual [64] can never be made truly invulnerable, but rather is under constant assault. Disease, deformation, disability are dangerous precisely because they can so easily infiltrate and pollute the previously pure and healthy body. Within this framework, it becomes understandable that the impulse toward altruism, to draw closer, to the suffering other is often overwhelmed by the equal and opposite impulse to withdraw and avoid

The othering of the sick person

The psycho-structural proposition of the I/Other split formulated by Lacan [65] and other psychoanalytic theorists [66] and social philosophers [67] highlights the human tendency to mark difference as more significant than similarity and to infer something dangerous and threatening from that difference. According to this theory, we tend to define ourselves not only in terms of self, but in terms of other [68]; not only in terms of who we are, but also in reaction to who we are not, or what we cannot allow ourselves to be. In Eriksonian terms, "positive identity" cannot exist without "negative identity" [69]. We are not able to recognize ourselves as pure, healthy, and good unless we have someone whom we can identify as defiled, sick, and "bad." The more the other can be confused with the self, the more urgent becomes this quest for boundary delineation. Projection is a strategy of self-reassurance that "domesticates" our fears of collapse and dissolution. Once located externally, "the fear of our own dissolution is removed. Then it is not we who totter on the brink of collapse, but rather the Other" [70]. All identities that are threatening, and therefore loathsome, to the clean and pure self, become "other."

The binarism of self-other is never value-free, but implies superior-inferior, dominant-subordinate relationships [71]. Thus, the accidental social goal of modern medicine, as opposed to its clearly conceived medical goal of curing disease, is the strict demarcation of sick from well [45]. The more medicalized we become as a society, the more barriers we must erect between the diagnosed person and the presumably healthy person [72]. Protection of the desirable self from being confused with or engulfed by the threatening other occurs through the concept of borders, which establish a self that is fixed and categorical [30,58,62]. To allow permeability in any form, including acknowledgment of shared vulnerability and suffering, is menacing because it leads to a destabilization of the healthy self [57,68].

Scapegoating

The most extreme form of othering is scapegoating, or the way in which individuals and groups pursue wholeness and reject the frightening or impure elements of themselves (such as vulnerability to illness and death) by projecting them out onto others [73]. The individual and/or group exclude and reject what they fear, and what appears to threaten their wholeness, in this case their goodness and value. As a scapegoat, the defiled person must be symbolically banished, clearly separated from the rest of the group.,. In the case of the sick, order is either re-established through cure and the return of the temporarily exiled to the healthy community; or through symbolic permanent stigmatization and separation to avoid further contamination.

Scapegoating often manifests toward certain ill persons who are "blamed" for their illnesses. In the early days of

the AIDS epidemic, this phenomenon was demonstrated not only in the discourse of the general public, but also among many physicians and nurses [74]. Today, it is tacitly accepted in some medical education contexts that residents can mock obese patients, or blame certain categories of drug-abusing, alcohol-addicted, or homeless patients for their medical problems [75]. More broadly, any ill person who cannot recover runs the risk of being defined as deviant [55], essentialized to the restrictive role of patient, thus losing many of his or her formally respected and valued identity attributes [47] and becoming the repository of everything that is feared and to be avoided in life and in medicine. Through various distancing mechanisms, the patient-victim is defined as the outsider, and the insiders are thus bound together [73]. The ill person operates as the stigmatized, scape-goated other [76] whose social role is to symbolically free the privileged, idealized figure of the healthy self from the vagaries and vulnerabilities of embodiment.

Modern medicine, health, and illness

Thus far, I have considered social phenomena that are supported in part by certain philosophical/culture assumptions and the psychological reactions they tend to produce. I will now turn to the profession of medicine and examine how it both attempts to address and falls short of responding to the societal/cultural milieu in which it is situated. Before proceeding, a caveat is in order.

Having worked as a medical educator for thirty years, I know from first-hand experience as well as the professional literature that the vast majority of students enter medicine motivated by idealism and the desire to help others. I also know that it is the conscious intention of most of the medical educators who are my colleagues within my own institution and around the country to produce graduates who are empathic and caring as well as competent. Further, I am aware that after emotional "peaks" of cynicism and disillusionment in third year and then again during internship, many physicians-in-training find their way to assuming an empathic stance toward their patients. I do not dispute or question any of this; and as a patient I am very glad for it. However, I do maintain that the philosophical structures and assumptions of medicine do not provide adequate guidance in this pursuit; and therefore trainees are often forced to stumble forward under the catch-as-catch-can mentorship of individual physicians who themselves have haphazardly discovered how to draw nearer to their patients. Therefore, my argument below is offered within the context of respect, affection, and esteem for practicing physicians on the front lines of medicine; and the conviction that the educational system can provide them with much better support and direction in cultivating a path toward empathy.

Modernist medical practice grounded in the assumptions of the scientific method addresses the contradictory human impulses of approach and avoidance toward illness and suffering in unique ways. The explicit goal of medicine has always been to prepare its practitioners to draw closer to their patients, with the intention of providing understanding and assistance. But in the modern era, "drawing closer" is mediated by technology: instead of observing and touching the patient directly, scientific advances often substitute technological intimacy for personal closeness. Understanding is translated as diagnosis and prognosis; and assistance becomes treatment and intervention.

It has been noted [77] that science requires a high level of abstraction to successfully promote theory and the testing of theory. Yet such abstraction, while advancing scientific development, encourages a tendency to think about reality from an exclusively abstract perspective, and to overlook the fact that it necessarily omits other aspects of reality that cannot be accommodated by scientific theory. An inadvertent byproduct of this "spirit of abstraction" is that what is not encompassed by or derived from the scientific paradigm is viewed as secondary, subjective, and unreliable. In medicine, such "unimportant" dimensions usually include all the patient's subjective experiences and reactions. In this sense, modern medicine promotes a kind of *scientific* altruism (cf. [78], "cognate professionalism") that still encourages approaching the patient, albeit as an object of interest, rather than a sympathetic subject. The fear and vulnerability underlying withdrawal are addressed by efforts at mastery and control.

In some respects, the modernist discourse that shapes current medical practice challenges the moral meaning of illness. Modern biomedical discourse focuses on disease conceived in terms of pathophysiological mechanisms, not punishment from God, or signs of moral weakness. Working within the modernist paradigm, Susan Sontag famously exposed the damaging effects of the metaphors that attach to stigmatized illnesses such as cancer and AIDS [79,80]. Modern medicine, by reducing illness to its scientific foundation, ostensibly removes moral judgment.

However, the reductionism and objective positivism that underpin medicine are not morally neutral. Its goals of solution, restitution, and restoration both emerge from and reflect western cultural fears of contamination, impurity, and death, Thus, the "cleanly mechanistic view" that science attempts to impose on suffering actually runs the risk of reducing the patient to a disease, an object, a practice that enhances controllability and safety but reduces empathy.

Obviously, infection and contagion have biomedical meanings, and in this regard, modernist contributions in the public health sector such as clean water, waste disposal, hand-washing, use of antiseptic, and even quarantine, have been invaluable in improving population and individual well-being. However, as with much in the modernist paradigm, conclusions that are sensible and useful from a scientific/medical perspective become unconsciously extended to the social sphere with more disturbing results.

The dichotomization of health from illness [81], and the presumption that illness can be eradicated or cured, for example, have produced invaluable breakthroughs in terms of alleviating and ameliorating physical suffering. However, these assumptions have also inadvertently transformed medicine into a vast enterprise to protect the healthy from the ill, to reassure the healthy that they will not become ill; or if they do unfortunately cross over into the kingdom of the sick [79], to ensure that they can be fixed and returned to normalcy. Disease that conforms to a modernist restitution story is more easily acceptable and less frightening. In the Parsonian view of illness [63] productive workers who become ill are allowed a temporary respite from societal obligations while they are restored to their previous good health, and therefore are once again able to assume their productive function (work). Illnesses that do not fit this paradigm become frustrating and frightening because they suggest restitution is not always possible. Because of the increasingly large number of patients with chronic illness in the U.S. [82], more and more individuals find themselves in this liminal state [83]. It is patients in this category who are most at risk from withdrawal and separation by their physicians, especially physicians in training.

The translation of modernist assumptions into medical education

Despite important curricular reforms and revisions, medicine at its core remains committed to an educational model that is reluctant to relinquish the modernist paradigm. In light of the discussion above, it is not surprising that patients can evoke feelings of fear, anger, disgust, and horror not only in the non-ill, but also in physicians and trainees, although these are rarely acknowledged [84]. Typically, the modernist paradigm urges physicians take refuge from these "unprofessional" reactions in scientific objectivity. Much of the project of medical education is devoted to promoting this safe, boundaried stance in its learners. It promotes the use of a depersonalized language [85], a way of thinking that prioritizes scientific rationalism, and a distanced professional demeanor [40] that enables its adherents to avoid tackling complex emotional issues in self and/or patient that are experienced as unsafe or threatening [86]. Basically, the modernist model of medical education frames the physician in a competent, heroic role in which fear and vulnerability do not play a part. Therefore withdrawal rooted in fear is perceived as unacceptable. Withdrawal based in scientific objectivity, by contrast, is deemed highly professional. Unfortunately, for trainees, it is easy to confuse the two.

Although ways of contemplating the medical experience that consider problematic physician emotions have been introduced in forms such as Balint groups [87], on the whole the dominant medical discourse into which students are socialized lacks a consistent element of reflection and self-awareness. Further, it encourages students to adopt somewhat limited professional roles that emphasize mastery, control, and an aspiration toward perfectability, in the sense of becoming increasingly fearful of making mistakes [88], thus forcing them to reject or deny more flawed aspects of themselves [89]. Suchman [90] discusses the attraction of this discourse to medical practitioners and learners because of its ability to make accurate predictions, achieve desired outcomes, and maintain apparent control of both health and illness.

The modernist solution of transforming patients into objects or tasks [91], rather than as "beings to be known" [92], consciously understood as a way of avoiding unscientific emotional entanglement, unconsciously also underlines and reinforces the "othering" that occurs in response to the deep-seated, culturally transferred fears of contamination discussed above. Once the patient becomes the other, empathy is no longer necessary. Thus the unintended but likely consequence of the modernist discourse's inability to address issues of contamination and othering is a kind of "system arrogance" [91] in which students may see patients not so much as human beings but as projects to be accomplished or puzzles to be solved.

Because students' educational exposure does not include sufficiently thorough preparation to reflect on, be present with, and come to terms with their fear and anxiety about being contaminated by patients' confusion, loss, vulnerability, helplessness, powerlessness, and suffering – and their own – these difficult emotions become objects of dread, to be avoided at all costs. Attempts at empathy in the face of such enculturated psychological pressures tend to exacerbate rather than diminish the student's own anxiety, and raise the likelihood that students' actions will be motivated more by the need to reduce their own discomfort than by the patient's needs [93,94]. In order to forestall contamination from patients in this figurative, emotional sense, students all too often comply with a hidden curriculum [95] that urges them to disavow encounters that disturb their fixed identity and the apparent order and predictability of the medical system. The necessity of boundary maintenance can create profound emotional

gaps between healer and sufferer. In this way, patients find themselves under the care of people whose capacity to connect with and care for them has been significantly disturbed [96], and includes "some lasting estrangement."

In a recent issue of *Academic Medicine* devoted to professionalism, several authors blame the hidden curriculum in medical schools for undermining overtly stated goals and values of professionalism [16,97,98]. Basically, these authors argue that medical school faculty and residents often behave in ways that directly contravene professionalism. Although the explanations for this discrepancy are complex, one possible interpretation is a failure of empathy. Putative physician role-models may prioritize efficiency and productivity over patient-centeredness because the systemic paradigm within which they operate does not cultivate empathy toward the patient nor place the patient at the center of care. Rather, the patient has become a means to other ends. This attitude reinforces objectifying and emotional withdrawal from the patient. Many physician role-models, of course, are able to successfully draw near to their patients. The daily practice of physicians is replete with examples of expressing empathy and solidarity with their patients. Nevertheless, in training, despite efforts to develop empathy as a basis for "drawing near" to the patient, this process does not emerge naturally out of the prevailing logico-scientific model, but instead seems like something "tacked on."

In search of complementary theoretical approaches to promote empathy

In considering the existing modernist biomedical paradigm, it is first of all essential to recognize its extraordinary contributions to the health and well-being of millions of people. Emerging as a product of the belief that people should not suffer, that human intelligence can be used to address and solve problems of physical suffering, biomedicine has been highly successful in achieving its intended goals: cure and amelioration of thousands of specific disease entities and medical conditions. It would be absurd to argue that the biomedical paradigm has become superfluous; and clearly understanding sickness in pathophysiological terms has been and continues to be of incalculable benefit to the human race.

However, the assumptions of the dominant biomedical discourse have had implications not only for biomedical interventions, where they have generally been highly pertinent and useful, but have spilled over into the promulgation of attitudes and values sometimes detrimental to the emotional well-being of the patient and the medical student alike. I have argued that the biomedical discourse has both distracted physicians from empathy, as being secondary and tangential to scientific intervention with patients; and in some cases has led to an unintentional, but powerful, stigmatizing and othering of patients. A paradigm that pursues and idealizes perfectability in the sense of control and mastery of disease and suffering is at once heroic and judgmental. Its enthusiasm for the perfection of health is admirable in many respects; but it can also leave outside its fold those patients who are unable to conform to its dictates. Further, the reductive empiricism of the biomedical model at a *narrative* level leads an emphasis on solution and restitution [83]. An unintended consequence is that the discourse within this paradigm stigmatizes patients who do not meet the restitution story.

Because of these unintended but real consequences, we must enlarge the focus of medical education to include knowledge from other paradigms that are more relevant to the development of empathy and altruism. Previous attempts cited earlier in this paper have not been sufficiently successful because western society in general, and medicine and medical education in particular, continue to privilege the modernist paradigm in a way that lacks nuance and specificity. The point here is that the primacy of biomedical approaches and attitudes is appropriate *in certain spheres;* but we must acknowledge equal and equivalent sources of other knowledge that may be more relevant, useful, and applicable in other spheres, such as determining how to be in relationship with patients. Biomedical knowledge cannot produce empathy, and inadvertently, through its emphasis on reductionism, positivism, and objectivity, it may produce the opposite. Just as we have logico-scientific premises from which the scientific paradigm emerges, so we need a narrative paradigm [99], grounded in certain philosophical premises about the proper relationship between people, to produce empathy and compassion.

This article has argued that, beneficial and insightful as new paradigms have been, to the extent that they continue to be absorbed into the existing modernist paradigm they will be stifled in their ability to reach their full potential, particularly in terms of assisting students in the development and practice of empathy. When attitudes and assumptions strongly embedded in our collective cultural unconscious are triggered, all of us, including students and teachers, will revert to these familiar ways of thinking and reacting. Unless training acknowledges and helps students to reconsider and work with the core boundary issues involving contamination and othering, even the best of alternative/complementary models can be distorted by the power of the modernist discourse to accommodate unnecessarily detached and objectified doctor-patient relationships. We need conceptual and educational approaches that can help students to not be afraid of and indeed to learn from their strong emotional reactions to patients, through "a mutual experience of joining that results in a sensation of wholeness" [100]. Without

acknowledging their shared mortality, frailty, and vulnerability, students will not be able to make much sense of truly caring for others [91].

What is needed in medical education are ways of moving students forward so that they are able to become familiar with their fears of contamination, the temptations toward othering, and learn to be emotionally present with their patients. Within a paradigm normalizing and validating this aspect of human life, with time and appropriate role-modeling, students can learn to experience and express profound clinical empathy without feeling at risk themselves.

An ethics of imperfection

Rather than trying to attach new ways of being in relationship with patients onto the modernist biomedical paradigm, we need to question the comprehensive primacy of the paradigm itself that leads student-physicians to continue to detach and distance themselves from patients. We might start by formulating an ethics of imperfection, a phrase first used by David Morris [101]. Although Morris does not elaborate in detail on this concept, as I understand it, this moral framework would be anchored in acceptance of the limited control we exercise in life and the imperfectability of life itself. This viewpoint suggests that we must learn to accept as well as to resist bodily vulnerability [102]. An ethics of imperfection would likely draw heavily on the insights of philosophers such as Ricoeur [103] whose philosophical theories could provide a foundation from which humane and empathetic behaviors might emerge not just as checklist behaviors, but as deeply felt moral imperatives.

Based on his awareness of the fragility of the human condition, Ricoeur argued that, although irreducible differences will always separate one person from another, ultimately we are inevitably bound up in a quest for mutual recognition and understanding. He recognized that we are all simultaneously capable and vulnerable. This assumption automatically loosens the role boundaries that confine competence to physicians and vulnerability and weakness to patients. Ricoeur further asserted that selfhood and otherness cannot be separated, once we realize that to be able to see oneself as another implies being able to see another as oneself. In this manner, the suffering of others becomes our own suffering. This position poses a challenge to the implications of scientific objectivity, but offers an important psychological position from which empathy for others will naturally and meaningfully emerge

Practical implications for clinical training of an ethics of imperfection

Research consistently shows that the most important influence on medical student attitudes and learning are positive physician role-models [104]. An ethics of imperfection requires role-models who express vulnerability, share mistakes, incorporate not-knowing; who are aware of and transparent about their emotional reactions to patients and about working the edge between intimacy and detachment; and most importantly, who acknowledge common bonds of humanity with their patients.

In addition to role-modeling, the goals and objectives of medical education are advanced through curriculum. Here what is required is serious focus on issues such as self vs. other; coping with difficult emotions, specifically fear, anxiety, and the desire to detach from death, dying, decay; and the humane and appropriate acknowledgment and management of medical limitations. Various methods exist to achieve these goals, such as reflective practices and incorporation of medical humanities [105-107]. Additionally, the curriculum could incorporate small group discussions with physician role-models to facilitate understanding of these issues; interactions with patients that focus on the patient as teacher [108], not only about the symptoms of the disease, but about the subjective experience of the disease. Finally, the curriculum should incorporate serious study of moral philosophy, not only from the currently still-favored principalist perspective [109] (where the focus is on what should or should not be done to/for the patient); but contemplating the writings of philosophers such as Ricoeur, Buber [110], and Levinas [111] to explore the significant moral implications that accompany the question of how to be in relation with another.

Many of these activities are already in existence, but too often they exist on the fringes of medical education. Rather than being viewed variously as nice fillips (or annoying wastes of time), they should be treated as central to the heart of medicine. Increasingly, we hear calls not only for curricular modifications, but also for institutional transformation and culture change [42,98]. Such proposals recognize that the basic premises of our medical education system need to be enlarged and humanized. It is fundamental change throughout the system of medical education that will help student-physicians learn to authentically face their fears of contamination, vulnerability, and ultimately mortality; learn to stifle their self-protective impulses toward othering or scapegoating of feared patients; and through all of these interior developments, learn to experience and express empathy and altruistically care for their patients.

Concluding remarks

The valuing of subjectivity and intimacy [112], the recognition of self in the vulnerable, diseased other, could open the door to a healthy permeability and confusion of boundaries [113] between student-physicians and their patients. From this perspective, the patient becomes no longer solely the doctor's "object," but part of the doctor's self. Such a view does not imply abandonment of scientific and humanistic efforts to alleviate suffering; but it does mean that when that is not possible, or only imperfectly possible, students can learn emotional responses other than uncontrollable anxiety and resultant othering. To learn to accept and see imperfection with tolerance, compassion, and recognition requires the ability to see both patients and self with fresh eyes, without preconceived ideas, with curiosity and caring [114,115]. It involves an emphasis on presence, rather than judgment [116]. An ethics of imperfection could help us recognize and explore, rather than reject and flee from, shared similarities with suffering others, while honoring the inexact and incomplete nature of apprehending their unique experiences [117] (see Figure 1).

Through ways of inclusive, rather than exclusive, thinking about illness, pain, and suffering, students could learn to understand and make sense of others' experiences. Working from this starting point, we might more effectively develop an educational environment that honors shared vulnerability of student-physicians and patients; teaches students to see the other not as the dreaded, rejected parts of self, but as an autonomous, reciprocal presence [118]; and accepts proximity to the patient, in the sense of being able to take a stand with the patient in the face of illness and death [119].

Such a complex perspective on imperfection simultaneously acknowledges parallels and strangeness, understanding and incomprehension between learners and their patients, the mutability and inevitable change in self and other [120]. An ethics of imperfection might facilitate learners' engaging in an excavation of their own and others' tragedies and suffering, rather than turning away in dread, because of the ability to contain and accept at a core level all aspects of life [121]. With a tolerance for and recognition of imperfection in self and others, we could more easily recognize the common bonds of students' and patients' humanity: in any given encounter, it might be easier to help students understand and accept that we are all wounded, all imperfect, and we all share our difference from each other with each other. Being able to emotionally contain with compassion rather than fear the difficult realities of the human condition can form the core for formulating a deep and lasting empathy. To see all humanity as flawed, suffering, and struggling enjoins humility, and cultivates common bonds, and the need to treat the other with kindness out of realization that the gap that separates self and other is not as large as we might think.

Ivan Illich wrote, "medicalized health undermines both our cultural and individual capacity to embrace and respond to pain and suffering" [122]. The self of the student-physician must emerge from philosophical assumptions that allow for the examination and integration of internal qualities that are chaotic, disintegrating, vulnerable, or disturbing; and that help students to recognize rejected others as connected to, rather than walled off from the self. A framework that supports provisional, fluid concepts of identity, openness to resemblances between self and others [123], acknowledgment of imperfection and limitation is needed to help medical students overcome fear and develop a deep and abiding empathy toward their patients.

About the Author

Dr. Shapiro is professor of family medicine and director of the Program in Medical Humanities & Arts, University of California Irvine, School of Medicine. As a psychologist and medical educator, she had focused her research and scholarship on various aspects of the doctor-patient relationship, including physician interactions with "difficult," stigmatized, and culturally diverse patient populations. She is currently writing a book on medical student poetry.

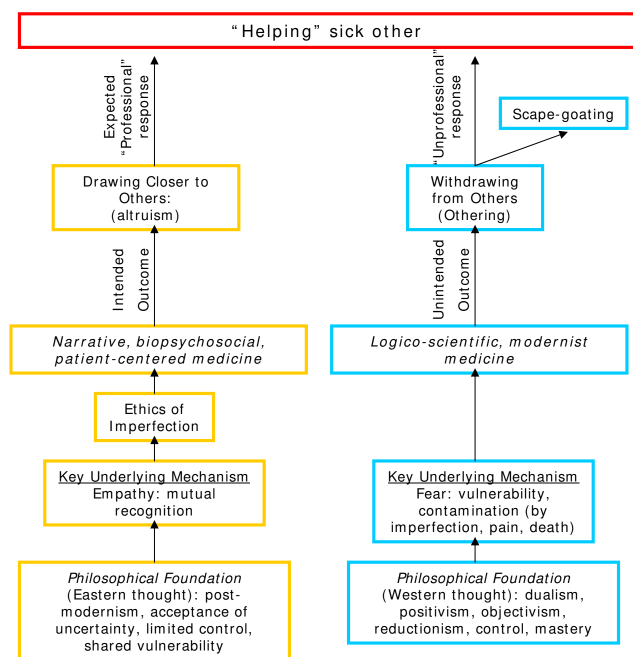

Figure 1
A model for conceptualizing the relationships between empathy and an ethics of imperfection; fear of vulnerability and othering; and the desired outcome of helping the sick other.

She is feature editor of the *Family Medicine* column, "Literature and the Arts in Medical Education," poetry editor for *Families, Systems, & Health,* and poetry co-editor for the e-magazine *Pulse*.

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BY

INVESTIGATING “OTHERING” IN VISUAL ARTS SPACES OF LEARNING

Monique Biscombe
Stellenbosch University
biscombemonique@gmail.com

Stephané Conradie
Stellenbosch University
stephaneedithconradie@gmail.com

Elmarie Costandius
Stellenbosch University
elmarie@sun.ac.za

Neeske Alexander
Stellenbosch University
neeskealexander@gmail.com

ABSTRACT

In the political, social, cultural and economic context of South Africa, higher education spaces provide fertile ground for social research. This case study explored “othered” identities in the Department of Visual Arts of Stellenbosch University. Interviews with students and lecturers revealed interesting and controversial aspects in terms of their experiences in the Department of Visual Arts. Theoretical perspectives such as “othering”, symbolic racism, the racialised body and visual art theory were used to interpret these experiences. It was found that “othering” because of indirect racism and language or economic circumstances affects students’ creative expression. Causes of “othering” experiences should be investigated in order to promote necessary transformation within the visual arts and within higher education institutions.

Keywords: othering; racialised body; transformation; visual arts; language

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INTRODUCTION

Higher education institutions represent critical spaces for learning in which dialogues between people from diverse backgrounds are encouraged. These interactions should build environments where difference is recognised. This includes recognising the categorical differences we project onto those who are “other” than ourselves in order to make sense of the difference we experience (Oloyede 2009, 427). Ideally, acceptance and celebration of difference should be evident in higher education institutions. The promotion of an identity that embraces multiple loyalties instead of producing conflict could lessen the gap between members of different cultural and racial backgrounds (Costandius and Rosochacki 2012).

In universities that were historically predominantly white, opportunities now exist for black students to enter. Although many of these institutions are making progress with regard to a numerical representation of black students and staff, a lack of “meaningful intergroup interaction” still exists between members of different racial groups (Oloyede 2009). Stellenbosch University’s position presents a twofold dilemma, because the demographic representation does not reflect that of South Africa and because the creation of inclusive environments for all students remains difficult. Many black students simply do not want to enter a place where their difference may set them apart from the rest of the largely racially and culturally homogenous student community (Costandius and Rosochacki 2012).

Stellenbosch University, designated as a race-specific (“white” Afrikaner) institution during apartheid, played a critical role in the cultivation of South Africa’s painful history. The university supplied the government with more than one of the National Party’s ministers. Stellenbosch University promoted a culture of “white supremacy” during apartheid and this subtly continues in new forms present on campus (Odendaal 2012).

This study aimed to explore “othered” identities within a South African political, social, cultural and economic context and, more specifically, the related challenges that may exist within higher education spaces of learning. The Department of Visual Arts at Stellenbosch University was used as a case study in order to analyse the ways in which students experience “othering”. Personal biographical experiences were collected from lecturers and students. Theoretical perspectives such as “othering”, symbolic racism, the racialised body and visual art theory were useful for interpreting these experiences. Excerpts from the interviews conducted with participants are presented, followed by a discussion of the data.

THEORETICAL PERSPECTIVES

Othering

This case study examined instances of “othering” experienced by marginalised identities within visual arts spaces of learning. It is therefore important to expand on the

concepts of the “other” and “othering”. While varying viewpoints of “othering” exist (for example the “fascinating other”) we chose the specific frame of “othering” and the “other” that is presented below. This frame is mainly based on the readings of Spivak (1985) and Jensen (2009). Framing the “other” as inferior, subordinate and unable to access education is relevant within the context of higher education institutions because it is part of the racialisation process that prevents transformation.

The concept of the “other” is complex in its definition. First, humanity is divided into two groups: one embodying the norms, whose identity is valued, and another defined by its faults, “devalued and susceptible to discrimination” (Staszak 2008, 1). Second, as presented by Gillespie (2007, 2),

> the representation of the other is deeply entwined with the representation of self...[O]thering occurs when Self represents Other in terms of what Self is not (and in terms of what self does not want to be) in a way that is “self-aggrandizing”.

For this reason, the “other” exists because of binaries in relation to the self. This concept relates to a Hegelian heritage (1947) in which the juxtaposition with the “other” composes the self (Jensen 2009).

“Othering” describes a multidimensional process that touches upon “several different power asymmetries”[1] (Jensen 2009, 10). Postcolonial writer Gayatri Chakravorty Spivak (1985) was the first to use the notion of “othering” in a way that was systematic (Jensen 2009, 7). By investigating representations of history, she identified three forms of “othering”.

The first form of “othering” involves an awareness of who holds the power. Those who are powerful produce the “other” as subordinate (Jensen 2009). The second form views the “other” as “pathological and morally inferior”. Those classified as “other” are considered “uncivilised, uneducated and barbaric” in nature (Jensen 2009, 10). The third form of “othering” involves denying the “other” access to knowledge and technology. This process establishes a “manipulative pedagogy” that produces an unnatural difference between native and master. This power imbalance allows those with power to maintain that power (Jensen 2009, 10). The “other” is therefore understood as being an inferior “other” and not a fascinating “other” (Jensen 2009). “Othering” plays a key role in racialisation, because it defines bodies as “other” according to race.

In the past, discourses of racialisation were used by the apartheid state to develop institutions and processes devoted to producing and transmitting knowledge that would support the apartheid agenda (Ratele and Shefer 2003). Each body affected by the discourses imposed by the apartheid state continues to be reactive to the “other” or defined against it. A symbolic agreement is reached where “harmony” between the self and the “other” exists and where the “other” does not challenge the notions of self set up

1 “The insistence of the specificity of othering of ethnic minorities, because it relies on racist assumptions about ‘visibly different minorities’, may include physical abuse” (Garland and Chakraborti 2006, 150–177).

by the dominating body (Bignall 2008, 131). Similarly, students who see themselves as different may feel that it is better for them to be assimilated into their environment. This possibly prevents further isolation by accepting dominant ways of thinking and being. Some students, however, may choose to live in the isolation they experience because of their difference. Students who are different from the majority may experience “othering” due to a lack of community in which they can “fit in” and find accountability.

Symbolic racism, symbolic power and symbolic violence

David Sears (1998 cited in Ratele and Duncan 2003) developed the term “symbolic racism” in order to describe and articulate racism and its development within the USA. He argues that traditional forms of racial discrimination are no longer obvious and visible. Contemporary forms of discrimination could consist of more subtle plays of power through muted violence. “Symbolic racism” is defined as emerging forms of prejudice and discrimination. This includes denying the existing patterns of racial inequalities, resentment of redress and antagonism towards demands for removing racism in society (Ratele and Duncan 2003). Contemporary racial discrimination can therefore be identified as “symbolic racism”. “Symbolic racism” may be exercised outwardly through various plays of power and subtle violence. Bourdieu’s (1991) development of the two concepts of “symbolic power” and “symbolic violence” may make valuable contributions to our understanding of “symbolic racism”.

“Symbolic power” has two distinct features. First, it does not reside in systems, but is defined in and through a given relationship between those exercising power and those submitting to it. Legitimacy and belief in words and slogans are created. This belief is produced and reproduced while maintaining or subverting social order. Second, “symbolic power” is a subordinated power that is a “transformed, misrecognizable, transfigured and legitimated form of the other forms of power” (Bourdieu 1991, 170). The process of “symbolic violence” becomes possible through “symbolic power”. An imbalance of power is cultivated that perpetuates the “other” as inferior by those exercising this power.

“Symbolic violence” refers to violence that is not physical or visible, but exists on a subtle level. This “violence” is felt on an unconscious level through body language, words and actions. It is difficult to pinpoint, but it remains deeply ingrained in individuals, without their awareness of it (Bourdieu 1991). “Symbolic violence” is the natural progression from “symbolic power” once the “other” eschews words, slogans and norms that are created and accepted by the dominant group (Bourdieu 1991). Therefore, “symbolic racism” is assisted by the presence of “symbolic power” and “symbolic violence”.

As the “symbolic racism” experienced by students may very well be more subtle and less confrontational, the use of the terms “symbolic power and violence” could give definition and lucidity to how this experience is perpetuated. Students of

colour are no longer barred from entering a previously whites-only university like Stellenbosch University, but they still feel "othered" and isolated from the community. The discrimination is obviously subtle. By describing how "symbolic racism" may be perpetuated through and assisted by "symbolic power and violence" we may more fully understand the levels of racism experienced by students.

The racialised body

The "body" in this study is viewed as a vehicle for the development of discourse. The body carries historical definitions that place it within a racial group. In spite of many anti-racial policies in South Africa, the body continues to be racialised within society and spaces of learning. Miles (1989 cited in Ratele and Shefer 2003, 94) uses the term "racialisation" to denote "a dialectical process by which meaning is attributed to particular features of the body in order to construct difference and legitimise inequality on the basis of 'race'".

During apartheid, the body was inscribed with discourses that still affect the way we categorise bodies today. Certain bodies were inscribed with privilege, while others were denied this privilege. Race was used to create a hierarchy of privilege. In post-apartheid South Africa, those who benefitted and continue to benefit directly or indirectly from this hierarchy should contend with the responsibility of the social capital they gained. Those who still suffer under continuing oppression should search for ways to reaffirm their identities. They should do this without adapting to the societal norms that sought to undermine them (Bignall 2008). The divide between bodies that benefitted from apartheid and bodies that suffered under apartheid creates significantly different experiences.

Difference is primarily emphasised through the racialisation of certain individuals and groups. The ideologies of colonisation and apartheid inform the binaries of this difference. Certain individuals benefit from a university's cultural and economic setting because they are part of a "white supremacy". Subtle alienation and prejudices experienced by those who are not part of this "white supremacy" exist within spaces of learning. This oppression continues because of a lack of awareness of the urgency for transformation. Teaching and learning are often composed without direct or blatant reference to race. Yet teaching and learning practices based on a "white" system hold direct implications for black[2] students. Transformation can therefore be stunted through hidden modes of communication (Jansen 2004, 11).

2 We use "black" here to include all those students who do not fall under the categorisation of white, acknowledging that this categorisation is a direct implication of apartheid laws. Disregarding this categorisation, however, would be to ignore the colossal impact that these laws of categorisation still have in South African society today (Seekings 2008).

Visual arts and “othering”

In the Department of Visual Arts, the outcomes reflected in the University’s mission statement (Stellenbosch University 2011) are not effectively realised. These outcomes emphasise respect for diversity and difference. Knowledge applied for the mutual benefit of the community is also emphasised. This mission statement is not practically visible in students’ work and the racial representation of the student body. The lack of racial diversity may contribute to the absence of dialogues centred on the complex social and political challenges South Africans face. A correlation can be drawn between the absence of social consciousness and the comfort of privilege that many of the students and staff members experience (Costandius and Rosochacki 2012).

A “blindness” towards difference may also be evident in the Department of Visual Arts. Jansen (2004, 117–128) states that a “colour blind” approach to curriculum is not a solution and that it is used to maintain the status quo of “white” superiority. Lecturers may claim that they “see students and not colour”. Jansen (2004, 117–128) critiques this by saying “that is exactly where the problem lies: a lack of consciousness, very often, of the ways in which schools are organized and teaching conveyed that in fact hold direct consequences for learners, identity and transformation”.

Prejudice and alienation may be perpetuated by the tradition of Western art. Traditions hold habitually established aesthetic styles that are thought to be appealing and beautiful and contribute to permanent value in a specific culture (Menon 2003). Traditions are recognised by academics, critics and members of the public because of the stability they attribute to cultures. In the past, traditions have been categorised in a teleological way – valuing some cultural traditions above others. In the West these traditions have come to acquire the title “classical”. Menon (2003) argues that this has a particular relevance to the arts, because certain styles and disciplines are attributed to the geniuses of a race – the European race. She goes on to say that styles such as painting, music and dance within a Western rhetoric are seen to be “true” standards of artistic genius. Western artistic forms have been used as a foundation on which other artistic modes are judged as inferior (Menon 2003) and arts curricula are dominated by works of Western culture (Giroux 1992). “Othering” may therefore be present in the way artworks are judged and valued.

An example is when a white lecturer is educated in a Western dominated system and shown only Western art as examples of good art. A perception is formed of what is good and when the lecturer evaluates an artwork that is influenced by African art, it could be subconsciously considered of a lesser standard. The students coming into the Visual Arts Department are mostly white students. The students of colour are in the minority and often feel uncomfortable talking and producing work about their own cultural and social experiences. The power dynamic in this instance is emphasised when topics relating to students of colour’s social and cultural backgrounds are discussed in class by white lecturers and students. Students in the minority group may feel that they do not have a voice to speak about their own experiences. If there were more students of

colour in each class and they felt like they had the freedom to discuss their experiences and consequently produce work about it, there might be an opportunity to challenge even their white lecturer into reevaluating the lens as well as the gaze from which the lecturer is teaching and evaluating a student’s work.

RESEARCH METHODOLOGY

A qualitative research design was employed for this case study. The social and cultural context of the research problem lends itself to qualitative research, because it focuses primarily on the value of processes and entities that cannot be identified by merely examining or measuring data collected (Denzin and Lincoln 2008). In terms of this design, researchers are required to acknowledge not only their own perspective but also the many voices that emerge during the research process. Researchers should adopt a reflective attitude towards inquiry that aims to gain a holistic understanding of the research subject. Qualitative research is useful for investigating social, educational and political imbalances that will inevitably be present within this particular field of inquiry.

For this study we worked with an interpretative lens, as recommended by Klein and Meyers (1999). An interpretive lens on knowledge requires reflection on how data are socially constructed and a sensitivity to contradictions, interpretations, distortions and biases of the narratives generated (Klein and Meyers 1999). We used a case study research design (Creswell 2003; Denscombe 2003) aimed at exploring and providing an in-depth investigation of “othered” bodies in visual arts spaces of learning.

This research started with a masters study that was conducted by one of the researchers, who is now a PhD student. Further data were collected after the masters research was completed and then four researchers collaboratively worked on the article. Involved in the study were two coloured, one PhD student and one part-time lecturer, and two white, a lecturer and one masters student, researchers. The coloured lecturer studied at the same department for six years and taught for one year, and the white lecturer was teaching at the department for ten years. The PhD student studied at the department for seven years and the masters student for one year.

Purposive sampling was used. Specific students were chosen because of their particular position in the department. This could be considered as bias because it relied on the judgement of the researchers. However, three researchers were involved in the selection which reduced the chance of bias to a certain extent. The original participants were chosen by the masters student and the next phase of interviewees were collaboratively chosen by three of the researchers (two coloured and one white). The reason why we included two coloured persons to make the choice was that they could associate more with feelings of being “othered” in this context and therefore could probably make a better selection. Coloured and white researchers were included to enable more objective analysis of the data.

Data were collected from observation and interviews. From 2012 to 2015, several interviews were conducted with 12 participants from the Department of Visual Arts. The participants, who involved eight students and four lecturers in the Department of Visual Arts at Stellenbosch University, were interviewed in an environment that was "safe" and comfortable. This means that the interviews took place in a quiet environment behind closed doors, where discussions could not be overheard and where participants could speak freely without fear of judgement or victimisation. The safe space provided equal opportunity to voice their opinions, which at times were brutally honest and controversial. The information gathered from the interviews provided in-depth insights into the experiences of the participants, as maintained by Yin (2009).

Two rounds of interviews were conducted. The participants from the initial selection consisted of two black, four coloured and two white students, and one black[3] and three white lecturers. The second round of participants were six students from the first sample. We asked a person from outside the university to do the second round of interviews because we wanted to reduce the bias from the researchers.

Inductive content analysis was utilised for analysing the data. This research approach allows for the identification of patterns and themes within the data collected. All the data were read by the researchers. Themes were compared and then we collaboratively decided what to use. All black and coloured respondents felt that they were "othered" in some way. One white respondent felt sympathy with black and coloured students for being "othered", and the other white participants did not feel that they were "othered". The lens that was used to analyse the data was both how students perceive themselves as "other" and how dominant culture sees them as "other".

FINDINGS AND DISCUSSION OF THE INVESTIGATIONS

In the following section the data from the interviews are presented. It is divided into four different thematic groups. At times participants' responses stretched over more than one theme. It is therefore important to read this section as a whole and to consider the interwoven nature of themes within qualitative research. The themes are governed by an overarching notion of "othering", but are discussed in four different sub-themes, namely symbolic racism, language and culture, economic and social circumstances and, lastly, visual hegemony.

Symbolic racism

In the Department of Visual Arts, racial discrimination can be described as "symbolic racism", as termed by De la Rey and Duncan (2003, 48). While the department does

3 Only one black lecturer was chosen because he is the only lecturer, apart from the researcher, who is black or coloured in the department.

not present explicit racism, indirect racism seems prevalent. Students who are directly affected by this indirect racial discrimination recalled their experiences.

Student S4 remembered the first day at the department as follows:

> …I was looking around and like – Where the hell are all the black people? [laughs] Oh my goodness, did someone get stuck in traffic? What is happening here?…You just know, from that day, I just knew, no one needed to tell me…it’s just something is wrong, something is very, very wrong. It’s a university, I understand if it’s maybe a high school, maybe the parents can’t afford to pay or something, but this is a university, where people can get funding. And you often wonder, like I really, really wondered, did I get in here by merit or because they just wanted their numbers to do something? And I am pretty sure it’s the second one, like honestly.

Student S3 mentioned the hidden nature of racism:

> But I’ve never been called the “k” word, but [it] doesn’t mean if someone doesn’t call you that then they’re not racist or whatever. Racism can come in different ways, you know.

Student S5 mentioned that coloured people would usually sit together. She also mentioned that her accent was mocked:

> People will like joke about uhm coloured people’s accents and then it’s like oh it’s fine to joke about it.

Student S5 recounted an incident which demonstrates the symbolic racism involving resentment of redress:

> This girl in my class she, we were talking about the language policy, and she is like “No, this English business is annoying now. You English people, why don’t you just go to [name of English university] or something? You knew that this place was upper class. Why do you want to come here…why do you want to come here and change it? Just go to wherever and go tell them, you know, to teach in English or to teach in new languages, but don’t come here and tell us to change [from] Afrikaans”.

Often racism also has to do with maintaining power. Power, as Student S1 explained it, is about maintaining privilege and comfort.

> They [white students] are comfortable, this is the safe zone for them. It is like home away from home basically. Everything gets done the way that they’re use to [it] being done.

Student S1 continued to say that:

> No one will openly say it like “I am a little racist at school, I have been raised that way”. Everyone is afraid to say [it]. Let’s just be honest about it…for my first year and coming to res[idence], like and you ask me who do I want a room with. I am going to choose a black girl, and I am not even going to lie about that. I am going to, because I am comfortable. But I think people…are just ignorant about it.

This student, S4, highlighted how it feels to be isolated merely by being in the minority:

> Even, I mean I remember when I was attending visual studies class and we were only two black people in my visual studies class…I don't know what you call it but there is a term for it. That all white people, no one is going to notice when you are not in class, but the two black kids – if you are not in class then they will know that you are not there.

Student S4 also highlighted her discomfort with the content of the courses:

> I mean you'd see all these pictures about slavery…and other things and people would be so, so like, I mean someone laughs here and laughs there and I'm thinking "What if that were my grandfather or something?"…It was not nice being in those classes. I'm just so glad it's over.

Student S9 mentioned how lecturers were speaking about her and how she didn't have the power to stand up for herself:

> [T]hey said…something like, aah you know, this one is struggling but it's to be expected, you know. Maybe she doesn't come from, blah blah blah or something, but it was something mean. I remember and then, did I say something back at her? No, I just hated her after that.

Language and culture

The culturalisation of racism is often seen through the use of language (De la Rey and Duncan 2003). Since 2016 the language policies of Stellenbosch University have aimed to include English as a medium of instruction. However, the predominance of Afrikaans as a medium of instruction (with interpreting into English) continues to be a source of concern. Language is connected to culture in the South African context. Students' experiences concerning language and culture relate to discrimination they experienced while studying at the Department of Visual Arts. Coloured students who understand Afrikaans and English could feel less othered in this environment than black students who speak another African language and English. It should be noted that Stellenbosch University aims to develop isiXhosa as a third academic language after Afrikaans and English.

Student S6 talked about the discomfort she experienced while attempting to include a non-Afrikaans-speaking student in a conversation:

> I have seen how other people have been discriminated against. It makes me feel helpless. Like when myself and another [black] student made some enquiries about bursaries together for post-graduate [studies]…So we went to this lady, for me when someone does not understand Afrikaans, then I speak in English, even if the Afrikaans people laugh at me and stuff. For me it is just about the person not understanding you. Why would you continue speaking in Afrikaans and at a fast pace and so?…Then the more I wanted to speak to the lady in English [to accommodate the student with me], the more she spoke in Afrikaans to me.

Student S3 recalled an incident:

> [The lecturer] was talking Afrikaans when he was criticising my work and then I'd say – I'd tell them, like if you're going to criticise my work then if you do it in English so I can hear you. And then he, he spoke English and then slipped it back to Afrikaans and then I remember me and [name of black student] we left during the crit.

Lecturer L3 recounts an incident during a Student Representative Council (SRC) meeting when a girl asked a question in Xhosa:

> [A]fter she asked the question all of us just started applauding her. We were like; yes make your point about the language issue in Stellenbosch, good for you. And then one of the SRC, white, tall, skinny boy answers her in Xhosa and then the applause was even louder...It was just this moment that I think I will never ever forget and I wish that, that was normal.

This student, S7, related her feelings of disjointedness to her own culture:

> The way she [a lecturer] spoke to me about my project was almost like, ja, she is a coloured and she lives in the coloured community and she knows more about being coloured than I actually do. Which I was quite offended by, because, I mean, I'm in both positions. I'm an outsider and I'm a coloured myself so I can speak for – I can't speak for [all] coloured people – but I can speak for my community kind of thing. And for her it was just like, ja, she can speak for the coloured people and the coloured community and the academic community all at the same time…
>
> I battled a lot with that project in terms of what coloured identity was all about. I got so frustrated at a time because I was like, being coloured is not about doilies and spices, it's not.

Lecturer L2 explained that language and communication, in a situation where diversity is present, requires negotiation:

> The language issue for me has always been like, if there's an area of negotiation, if someone cannot articulate themselves in a certain way then...[we have] to work together and to find ways to communicate. I have my technician who can translate for me in some ways and I have other students who chip in when someone else can't say anything or doesn't have the right words to say something. To that extent there is a process of negotiation.

Economic and social circumstances

Socio-economic differences between students become apparent in the Department of Visual Arts. Students who do not have access to extra finances have difficulty completing certain assignments. This has a social impact.

This student, S4, shared her feelings regarding economic challenges:

> There's…a few individuals who like come from wealthier backgrounds and like obviously their parents will provide. But, for me it's like, aah, I need to think, you know? Maybe I should budget here a little bit and not be too extreme, so [my economic circumstances] did kinda impact me.

Another student, S3, had this to say:

> Definitely the extra expenses [are] a lot. I think it definitely can stop the [creative] process because you will be working and then all of a sudden you’ll think “Oh, I need to buy paper” and then you kinda think, well let me put it off for another three days until I pluck up courage to ask my parents.

Finally, this student, S7, summed up her attitude towards economic challenges:

> I think that [money] was actually an issue for me, because a lot of the times I couldn’t even buy a bottle of thinners. And I mean, I don’t look down on that, I understand that, you know? My father was the only one who was working in the whole household and it wasn’t even for like millions or whatever…so I understood that asking for money every time for the exhibition was out of the question. And I felt, now looking back on the course, I felt that maybe, if I had more money, I would have gotten higher marks.

Visual hegemony

Discrimination and “othering” can affect students’ creative processes as well as the work they produce.

This student, S2, gave her viewpoint:

> You get this very kinda, similar mindset, where everything is just from their [Afrikaans students’] point of view and then it’s a very Afrikaans point of view. It’s always from a very privileged position, the art that’s made. It’s never this real struggle that people are dealing with – poverty and racial issues – which is so prevalent in our country and then you think, well it’s an art department. We should be talking about these things.

Student S8 explained how diverse spaces of learning may contribute to the teaching and learning experience:

> I‘ve often thought when something like a revolution happened, the only time it was successful was when you threw out a lot of things. It doesn’t feel like anything is being thrown out here in Stellenbosch and to a large extent I think the foundations should be shaken a little bit. We get so used to the system that you become so part of it and so relaxed in your own comfort zone.

Student S3 recalled an incident:

> And I remember when, I think it was me and, me and [name of black student], it was a photography project…I was used to be being, like at the bottom, or being the second from at the bottom, and then from like second year things slowly changed and then…I think it was a seventy for a project, for photographic project and then [name of black student], got like an eighty and that. Giving the credit became an, it became an issue. I remember we had a crit…the guy [name of fellow student] was very, he was very mad like “Why did I get like a seventy?”…so he really felt like I didn’t deserve that seventy and then also…talked about [name of black student], not deserving that mark that she got.

DISCUSSION

The discussion that follows focuses on various issues that arose from the experiences of participants in the Department of Visual Arts of Stellenbosch University. These issues include symbolic racism, language, socio-economic influence, the dominance of Western narratives and the difficulty related to “othering”. Symbolic racism results in discomfort for students of colour and stinting of transformation in higher education settings. Transformation is linked to language policies – a contested issue within Stellenbosch University. Language holds political and cultural power. Apart from language, the socio-economic backgrounds of students also influence their ability to produce academic work and create an imbalance of opportunity among students. An imbalance in the representation of themes is evident in students’ work. Western discourses dominate and perspectives are often narrow and exclusive. It remains difficult to discuss “othering” in educational settings, because lecturers may assume that their knowledge of the “other” is superior. Critical citizenship and reflective thinking can be used as tools to address these issues within visual arts learning spaces.

Students mentioned that it was uncomfortable to be students of colour in a class that was predominantly white. This discomfort became especially pronounced in situations where colonialism, apartheid and post-colonialism were taught and discussed. Students felt that in these situations their difference was accentuated, which made them feel more “othered”. When people are confronted with situations of discomfort, it could be easier to amalgamate to the environment than to confront the discomfort. In the visual arts, expression plays a key role in learning. If freedom of expression is hampered, the learning process is hindered. Students may feel more comfortable voicing their opinions in their academic writing than discussing their opinions and ideas in an everyday scenario. This discomfort inevitably seeps into their artistic process, which is very reliant on an open and confrontational way of working and discussing their ideas. Symbolic racism causes discomfort for students of colour and allows white hegemony to continue.

Academic requirements help to shield previously white universities from radical racial transformation by using merit to award positions for study. Oloyede (2009) argues that educational practices are used in the process of normalising marginalisation because those accepted into universities are often accepted on the basis of their academic prowess. Ideals of progress and control may allow white academics to negate their role in transformation while perpetuating racism. Discourses of merit allow academics to uphold intellect as the chief concern of universities while transformation, social cohesion and racism receive far less attention. Academics may also disregard pressing issues concerning race, because some universities’ internal bureaucracies, which favour white supremacy, have been firmly established (Oloyede 2009). Symbolic racism is practised through a denial of the patterns of racial inequalities that are still prevalent in Stellenbosch University’s context. It is also revealed through attitudes and actions of resentment regarding the urgent need for redressing patterns of racial inequalities. As

a result, antagonism towards certain demands for removing racism exists (Ratele and Duncan 2003).

Part of the way that Stellenbosch University maintains its position of white supremacy, in an evidently changing demographic landscape, is through language. Language plays a major part in upholding elements of symbolic racism in the Department of Visual Arts. Some instruction and communication with peers and lecturers occur exclusively in Afrikaans, even though the university's new language policies promote dual-medium instruction. In recent years, the university has been obligated to address issues of bilingualism and single-language instruction (in English) due to a large influx of English-speaking students. This has caused an array of debates and problems, because some parents and alumni are adamant on maintaining the key role of Afrikaans in the university's language use. Older generations' strong opinions about language policies often filter down to younger generations of students. Language can become an indicator of social change. It has come to represent where progress is evident or where it is hindered (McKinney 2007).

Language signifies systems of power. Symbolic power denotes a system of power that is seemingly invisible and exercised with the involvement of those who are subjected to it yet are unwilling to acknowledge either their role in its implementation or their powerlessness within it. Systems are therefore utilised to enable and ensure the control of one group over another through tools of communication and knowledge (Bourdieu 1991). Language at the university can be used as an agent of control by those in positions of power. The Afrikaans language is tainted with political undertones, because for many black people it is symbolically related to white Afrikanerdom.

Language can also be an indicator of culture. Language links representation to meaning and culture. The representation of meaning allows us to say something significant about how we present ourselves to the world (Hall 1997). At the Department of Visual Arts the majority of the students and lecturing staff are still predominantly white. Those students and staff members who are in the cultural minority in the Department of Visual Arts may need to negotiate their identities in order to avoid cultural isolation. Language conveys meaning in a system of representation that symbolically evokes broader issues of knowledge and power. Foucault (cited in Hall 1997) points to discourse as the production of knowledge through language. Discourse governs the way in which social practices are constructed. Discourse entails both language and practice (Hall 1997).

Social practices in the Department of Visual Arts such as isolation and "otherness" are not limited to racial, cultural and language issues. They encompass a wider social perspective in which the socio-economic context of students must be taken into consideration. The degrees offered at the Department of Visual Arts require extra expenses. A distinction is made between those who can afford these extra costs and those who find it financially difficult to do so. In effect, financial difficulties also bear consequences for the academic work produced. Unequal economic backgrounds create an unfair playing field. Students who suffer in these conditions are often burdened

with feelings of guilt and shame from continuously asking their parents for money when conditions at home are financially unstable. Imbalances in social and economic circumstances present in the Department of Visual Arts at Stellenbosch University produce a sense of discomfort and pretence.

The focus areas on which students in the Department of Visual Arts choose to concentrate when producing work are of concern. The work produced represents a very narrow worldview. This worldview remains a largely Western one, in which challenging social questions are generally absent. If these issues are addressed, it is often from a very specific perspective that exposes disconnectedness to perspectives outside the students’ context. Approximately half of the students at the Department of Visual Arts come from a white Afrikaner heritage. This heritage is a reoccurring theme often studied and researched. Students are encouraged to study their identities and traditions. Students who do not share this particular heritage are also encouraged to look at their own traditions and culture. Many students, however, do not wish to do so because they feel that if they reveal their differing cultural traditions they will be isolated. Menon (2003) argues that artistic styles within a Western rhetoric are seen to be the idealised standard. This standard is seen as the norm that is used to judge other artistic modes that fall outside this ideological perspective.

As we have mentioned before, students have freedom within their artistic work. Yet work produced in a certain institution is influenced by the main discourses taught there. It is within this setting that we would like to argue the following: Stellenbosch University, and especially the Department of Visual Arts, because of its history, has foundations in European ideals that remain influential. It is very difficult to discuss ideas relating to the “other” in this learning space without being burdened by its position in the South African context. In her seminal work “Can the Subaltern Speak?” Spivak (1985) talks about the representations of historical reality. She highlights that “othering” involves an awareness of power, the production of power and the representation of the subordinate. “Othering” takes power away from those being discussed and researched and allows it to be placed into the oppressors’ hands to further manipulate the way in which the “other” is viewed and written about. Students in the Department of Visual Arts must therefore rely on knowledge brought across to them by intellectuals who have power over the knowledge being produced in the department. Students from cultures other than the dominant culture present in the department find it difficult to speak about their own traditions and backgrounds. This may be due to the way lecturers assume superior knowledge of these “othered” traditions and heritages. Challenging educational contexts could be mediated by critical citizenship education and reflective thinking.

As Johnson and Morris (2010) suggest, reflective thinking involves a holistic understanding of the context in and around the spaces of learning as well as the relationship between the lecturer and student. To address students’ feelings of “otherness”, it becomes necessary for lecturers to promote and facilitate learning that is not tied to political motives, but instead nurtured through an understanding and an adoption of reflectivity. This will enable them to have a better understanding of

the many issues with which students grapple, making it possible to deal with daily complexities that exist within spaces of learning. Combining critical citizenship with reflective thinking enables dialogue between students and lecturers, which is necessary to address issues of “othering” within spaces of learning. This creates a partnership that is vital for pedagogy.

CONCLUSION

Visual Arts departments are normally considered safe spaces of free expression. In this study it became clear that the creation and maintenance of a “safe” and “free” space of learning require deeper investigation in order to understand the complexities involved. “Othering” because of indirect racism, language or economic circumstances can affect students’ creative expression even though the spaces of learning are often considered equal and free.

Participants’ experiences reveal the challenges that are deeply rooted in the historical and current narratives of the town in which the university is situated. It also highlights some of the many trials students face with regard to reaffirming their identities in a post-apartheid society. It is difficult to articulate the symbolic racism within the department, because a minority experiences it. And often one only becomes aware of it as an afterthought and in hindsight. As one researcher put it:

> You doubt and downplay it as nothing, a mere figment of your imagination. If you call your experience racist you are labelled as too sensitive and calling a race card just for the sake of it. But you feel it, you are always aware of it, you deliberately (well mostly) choose to say and do nothing about it because of the fear of being ridiculed, shamed and causing conflict.

We are of the opinion that addressing the social and economic imbalances within spaces of learning will help address feelings of being “othered” that have been experienced within these spaces. In terms of social and economic circumstances, it is evident from the research that a minority of students experience difficulties. It is our suggestion that, at the start of each project, all students should work with a fixed budget. A suggestion would be that the finances that go towards purchasing materials should be included in the student fees and the same amount should be available to each student at the start of each project. This would not only ensure an equal playing field for students to create work, but would also encourage the development of skills to solve problems creatively through considering materials and working within budget constraints. It may prove to relieve feelings of financial pressure and thereby reduce feelings of being “othered” among students within spaces of learning.

We also suggest that critical citizenship education be expanded within the curriculum at the Department of Visual Arts. It involves processes of critical thinking and critical pedagogy that promote reflective thinking, learning and dialogue. Promoting reflective thinking among lecturers and students would provide lecturers and students with an opportunity better to understand the circumstances in which people find themselves. It

would also encourage a necessary dialogue between lecturers and students. This dialogue could include students' involvement with creative briefs, surveys and assessment forms that should be filled in by students on a regular basis. Lecturers could become more accessible to students. Students should feel able to voice their opinions freely without fear of the consequences. Improving the dialogue between students and lecturers may enable a relationship founded on a mutual trust necessary for personal growth and growth within post-apartheid spaces of learning.

The data suggest a need for spaces of learning to be more diverse. The implementation of an extended degree programme that allows students from disadvantaged backgrounds an opportunity to enter the degree programme would be a way to address inclusion. A minority of black students does not encourage transformation. We argue that diversity within spaces of learning could contribute to learning experiences that are enriched by knowledge from varying racial backgrounds and perspectives. This would promote a necessary development within the spaces of learning in the Department of Visual Arts of Stellenbosch University.

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Framing China: Discourses of othering in US news and political rhetoric

Su-Mei Ooi
Butler University, USA

Gwen D'Arcangelis
Skidmore College, USA

Abstract

China has emerged in the early 21st century as arguably the most important partner and rival to the United States. Increasingly, the United States perceives China's rise on the world stage as a threat to US global hegemony. US national discourse has constructed China, we argue, as a *potential* enemy Other—an ever-present threat with whom we cautiously partner with. This article situates this flexible construction within the history of Orientalism in US national discourse—China as exotic other, yellow peril, red peril, and little brother—and considers the cultural work that the trope of China as potential enemy other performs to justify US actions to keep China in line. Specifically, the article traces Orientalist tropes that emerge in US political rhetoric and news media pertaining to three areas of significance in US–China relations—China's national currency valuation, cyber espionage, and maritime disputes in the East China Sea and South China Sea.

Keywords

China, cultural imperialism, discourse analysis, economics, international relations, media, newspapers, political communication, US foreign policy

Introduction

The relationship of the United States and People's Republic of China (China) is arguably one of the most important in this century. The ability of the United States and China to maintain a cooperative

Corresponding author:
Su-Mei Ooi, Butler University, 4600 Sunset Avenue, Indianapolis, IN 46208, USA.
Email: sooi@butler.edu

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relationship will shape, to a large extent, outcomes on key global issues such as the stability and growth of the global economy, resource scarcity, climate change, and the nonproliferation of weapons of mass destruction. Since President Nixon's policy of constructive engagement over four decades ago, the strategic partnership of the two has grown to an extent unimaginable back in 1972. The alignment of strategic interests between the two has led to policies of undeniable mutual benefit to date—on one hand, China's access to world markets has allowed its economy to grow at impressive rates; on the other hand, this growth has helped to sustain US spending and thus, its maintenance of global hegemony.[1] In recent years, however, sharp disagreements have surfaced on numerous fronts, and the United States has sought to maintain dominance in the partnership. One of the mechanisms that have facilitated this, we argue, is the construction of China via long-standing Orientalist tropes that, at once flexible and durable, are easily mobilized and adapted for strategic political ends. As formulated by foremost scholar Edward Said (2014), depictions of the "Orient" have served as ideological tools aiding empires since the late 18th century—first the British and French, subsequently, the United States. The role of knowledge production in the colonial project, which Said termed "Orientalism," has relied primarily on producing images of the "Orient" in dualistic terms that serve to affirm Western cultural superiority—for example, in depicting the "Orient" as backward, the West becomes civilized; in casting the former as superstitious, the latter becomes scientific; in describing the former as irrational, the latter becomes rational; in representing the former as archaic, the latter becomes modern; in fashioning the former as evil, the latter becomes good; in painting a picture of the former as violent, the latter becomes peaceful. The affirmation of Western superiority and concomitantly, the cultural and moral inferiority of the "Orient," have served to justify Western expansion and global control over lands, peoples, and resources.

Western construction of the cultural and moral inferiority of China has had a long history and includes an array of portrayals that can be read in light of specific European and US colonial aims. These include images of China as exotic and immoral in the 1700s, as a cunning and diabolical "Yellow Peril" in the late 1800s, as a freedom-loving and democracy-loving "China Mystique" during World War II, and as an ideological, economic, and military "Red Peril" during the Cold War (Kim, 2010; Leong, 2005). Since the end of the Cold War and the definitive establishment of US global hegemony, China has vacillated in the US imaginary between the latter two positions, viewed at times as a little brother following imperfectly the path toward modernity, at times imperiling the world order (Kim, 2010; Vukovich, 2012). This ambiguity continues to occur through the present day and, in light of China's rise as a global power since the late 1990s, China is increasingly portrayed, not necessarily an enemy, but always a potential one. This construction of China as a potential enemy Other reflects the relationship of mutual interdependence carefully cultivated by many US administrations at the same time that it functions to justify the paternalistic monitoring and policing of China to ensure that China never overtakes the United States on the world stage. With this frame in mind, we examine the recapitulation of Orientalist tropes in the post-Cold War context, focusing, in particular, on representations and language used in US news media and political rhetoric.

We examine three highly charged economic and security issue areas where the othering of China is perceptible: (1) China's currency valuation, (2) cyber intrusions that target commercial and military information, and (3) maritime territorial and exclusive economic zone (EEZ) disputes. We focus on three tropes that emerged in our analysis of each of these areas: China as cheat, thief, and lawless bully, respectively. Each trope can be situated in relation to Orientalism, and thereby, we argue, recapitulates (or attempts to recapitulate) US dominance. As these Orientalist tropes are

likely to detract from the ability of the US public to make fair assessments of US China policy, we also counter these Orientalist depictions with a more nuanced picture of China's policies and actions, in the process demonstrating how one might come to better understand these specific issue areas in the US–China bilateral relationship. Before doing so, we turn to a brief discussion of our data sources and methods.

Sources and methods

Our study draws not only on the theoretical framework of Orientalism but also on the literature that demonstrates the role of images in US policy-making—both to articulate and to generate support for US foreign policy. Most notably, US foreign policy expert Oliver Turner has shown that "American images of China are inextricable from the formulation and enactment of Washington's foreign policies toward China," a significant contribution to literatures that provide only materialist accounts of US China policy (2014). For instance, US involvement in the Opium War with China was ostensibly incompatible with its anti-Imperialist identity, which makes a solely materialist account of the policy choice inadequate. Turner argues that policy consensus could only have been reached by a certain representation of China—China was backward and anachronistic, and her people were in need of Western intervention—which helped to justify an Imperialist war (Turner, 2014). Indeed, we follow in the wake of numerous Critical International Relations scholars who, drawing on insights gained through Edward Said's work on Orientalism, have established the role that othering plays in shaping and justifying US domestic and foreign policies (Buzan & Wæver, 2003; de Buitrago, 2012; Steuter & Wills, 2010; Turner, 2014).

Our analysis focuses on two key sites of US national discourse on China—the news media and political rhetoric (or strategic communicative action that could be taken by a range of actors, including political leaders and pundits, in order to persuade the public on a given political issue) culled from publicly circulated official documents and reported statements from various online media sources. Public statements made by political leaders and official documents were chosen because the political rhetoric employed there shapes public opinion of China, US–China relations and US China policy. The news media was also chosen as a primary site for discourse analysis because it constitutes an important means through which the US public garners information and ideas about US foreign policy. Political rhetoric and news media texts were examined to establish the presence of Orientalist themes identified in the literature, particularly as delineated by Asian American Studies scholars Jodi Kim (2010) and Karen Leong (2005).

We identified Orientalist themes through a preliminary perusal of publicly available official policy documents, statistics, analyses, and recommendations from political and economic think tanks and published academic articles. By triangulating data gathered from these various sources, we identified prominent Orientalist themes within the issue areas of China's national currency valuation, cyber activities, and maritime disputes in the East China Sea and South China Sea; these characterizations were China as cheat, thief, and lawless bully, respectively. Each theme was a manifestation, we theorize, of the construction of China as potential enemy, drawing on older discourses of China as the Red Peril, and at times even the Yellow Peril, as well as newer discourses of the "sleeping giant"—a post–Cold War version of the "little brother" who threatens to overtake his elder. Our analysis (in subsequent sections) describes in more detail the way that each trope manifests the discourse of Orientalism.

News media texts were selected using progressive theoretical sampling (Altheide, 1996). For our initial search, we selected key terms[2] that we thought would best identify our themes

(noted above) and adjusted accordingly to collect all relevant texts containing Orientalist discourse. The starting point chosen for the initial news media search was 1990, since China's geopolitical and geoeconomic significance rose significantly with the fall of the Soviet Union. However, many of the significant Orientalist themes emerged well after 1990, as is described in each of the three thematic sections to follow. ProQuest Newsstand, a robust database, was used, and we limited our search to news venues that were of high impact in terms of public circulation (the top five most widely circulated newspapers in the United States are *The New York Times, Wall Street Journal, The Washington Post, USA Today*, and *Los Angeles Times*, and a focus on these elite newspapers has been a well-established method to identify influential public narratives (see, for example, Merskin, 2004; Steuter & Wills, 2010). In each of the three issue areas, our search yielded approximately 1000 articles; theoretical saturation (Strauss & Corbin, 1990: 188) was reached after examination of approximately 100 articles in each area. Representative texts containing prominent Orientalist themes (ones that emerged with sufficient frequency in these news venues) were then selected for interpretive textual analysis. Political rhetoric within the last 5 years was examined, and we focused particularly on key moments in the electoral cycle, as our preliminary perusal had demonstrated that the polarizing debates of presidential campaigns provided the most fertile conditions for Orientalist tropes on China to emerge. Here, we present representative official statements that cast China in an Orientalist vein.

China as cheat: currency squabbles

The merchandise trade deficit that the US maintains with China—which grew to a total of US$365.7 billion in 2015 before falling to US$308.9 billion in 2017—has been a long-standing issue of concern for the United States (United States Census Bureau, 2016, 2017). The trade deficit is often attributed to unfair trade practices and the artificial undervaluation of China's currency. The United States has registered numerous trade disputes with China over the years via the World Trade Organization (WTO) dispute settlement mechanism with success. Up to 2010, China has, moreover, kept its national currency undervalued to drive exports. This dimension of US–China trade relations is of interest here because China has, since 2005, adopted a more flexible exchange rate regime and gradually revalued the yuan—not least because of political pressure from the United States. Indeed, in May 2015, the International Monetary Fund (IMF) stated that the Chinese yuan was no longer undervalued (*The Wall Street Journal*, 2015). The Bank for International Settlements (BIS) estimated that the yuan had, in fact, been most recently overvalued about 32% compared to its trading partners, and the most expensive among 60 countries (*Forbes*, 2015).

US political rhetoric has so far been out of step with these changes and has failed to explain the reasons for which previous motivations to undervalue the yuan no longer hold. In a charged exchange between candidate Mitt Romney and President Obama in the 2012 presidential debate, for example, the former accused the latter for failing to call out China as cheat: "China has been a currency manipulator for years and years and years … and the president has a regular opportunity to label them as a currency manipulator, but refuses to do so" (Paletta & Davis, 2012a). Romney went on to build on this image of China to shore up his credentials: "On day one, I will label China a currency manipulator, which will allow me as president to be able to put in place, if necessary, tariffs where I believe that they are taking unfair advantage of our manufacturers" (Paletta & Davis, 2012b). At the time, the yuan had already increased by 11% since 2008.

The trope of China as cheat can be read in light of historical constructions of China as the Yellow Peril, a notion that continues to shape depictions of the Chinese as cunning, sneaky, and immoral in US political rhetoric today. These stereotypes emerged in the late 1880s to fuel anti-Chinese sentiment, when United Statesians responded to the influx of Chinese labor and settlement as a threat to White wages, White social dominance, and family structure. These depictions helped to justify harsh immigration laws barring Chinese settlement. In the current context, depictions of China reinvoke this older Orientalist trope to paint not only a similarly suspicious figure but also a tenuous economic partner with the potential to turn into the Red Peril that refuses to abide by the rules of the capitalist market.

This was again perceptible when the yuan was devalued by 2.3% to bring it more in line with a market-determined rate in the Fall of 2015 (US Treasury, Oct 2015). That markets and politicians are sensitized to the slightest downward movement in China's currency value was underlined by the agitation with which Congressional representatives reacted to the devaluation of the yuan. The US Treasury, which played a key role in pressuring China for a market-determined currency, was cautious in its initial response; however, Congressional critics such as Senator Charles Schumer (NY-D) went on the record saying that this move was indicative of China's attempt to "double down" on currency manipulation and that the yuan "should be barred from consideration as a global reserve currency by the IMF" unless China "stops artificially devaluing" it. Indeed, he is quoted as saying that "China has rigged the rules" for years in "play[ing] games with its currency" (Bradsher, 2015). Furthermore, Republican Senator Rob Portman said that the devaluation was yet another "harsh reminder" that China "refuses to play by the rules" (Portman, 2015). Republican Senator Lindsey Graham joined the chorus by stating that "today's provocative act by the Chinese government to lower the value of the yuan is just the latest in a long history of cheating" (Graham, 2015).

The timing of the 2015 devaluation of the yuan did palpably advantage China at a time when exports were slowing, but there remains a discrepancy between the depiction of China as cheat and the complex economic reality of today. As growth rates slow and capital outflow takes place, undervaluing the yuan is no longer in China's best interest. In the longer term, China is also likely to avoid a policy of undervaluation as it attempts to rebalance the economy toward domestic-driven growth, as a stronger Chinese yuan increases the purchasing power of its population. Importantly, its (now successful) bid to have the IMF recognize the yuan as an official reserve currency on par with the US Dollar, Euro, British Pound, and Japanese Yen constrains significant devaluations. In this regard, pro-business newspapers such as *The Wall Street Journal* have gone some way in providing the counterweight to the image of China as currency manipulator through more objective economic analysis. Yet, conclusions such as "China likely isn't regressing" suggests that only tentative conclusions are drawn about China's ability to conform to fair rules of play ("China's Currency Policies Win Cautious Praise Abroad," 2015). While some journalists have underlined the economic interdependence between the United States and China (Mallaby, 2005; "Paulson's China Victory" 2006) and pointed out that China has become a "punching bag" since the 2012 partisan presidential electoral politics (Paletta & Davis, 2012a), space has also been given to presidential hopefuls to perpetuate the image of China as cheat by framing the yuan's recent downward slide as "foreign currency cheating" (Trump, 2016).

The long-standing Orientalist narrative of China's cheating behavior, its destabilizing effect on the global rules of the liberal trade regime and the negative impact on US corporate interests and job security, remains easy to invoke after being the predominant theme in US public discourse on US–China economic relations. This narrative helps to bridge the gap between reality and fiction and turns an economic partner into an enemy. Enemy-making in the economic realm is particularly

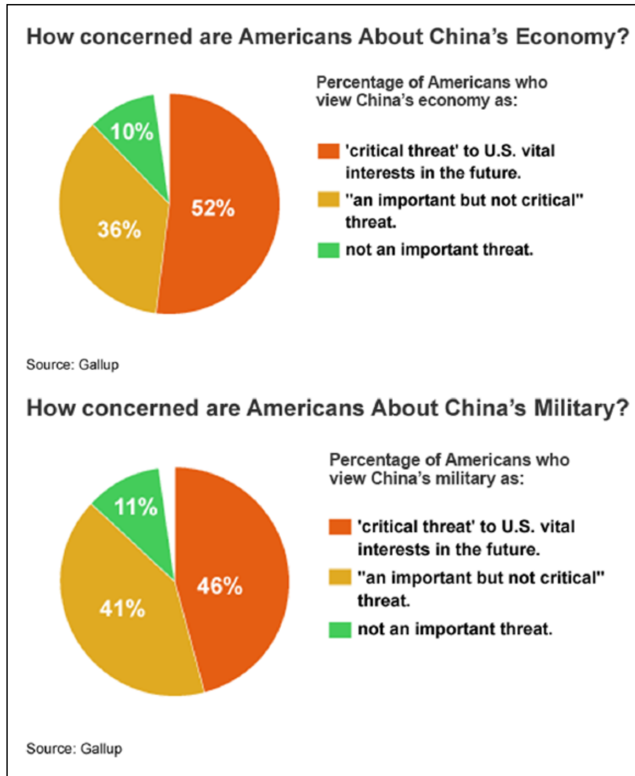

Figure 1. Gallup's annual World Affairs survey 2014.

problematic, moreover, because polls indicate that the US public tends to pay significant attention to the economic relationship with China precisely because it most directly affects them. Gallup's 2014 annual world affairs poll indicated that more Americans perceive China as an economic threat than a military one, unsurprising since China's impact on the US job market feels more immediate to Americans than military developments in Asia (see Figure 1).

China as thief: cyber battles

The construction of China as potential enemy Other takes on an additional hue when we look at the depictions of China's cyber activities—China moves from cheat to a more malicious cousin, the thief. The United States first focused on issues of "cyber warfare" in the mid-2000s to late 2000s, but at the time, the trope associated with China was not necessarily that of thief. In the mass news media, a militaristic lens framed much of the discussion, depicting China as a rule breaker flouting international norms and thus posing a security threat. For example, a *Los Angeles Times* article highlighted that "China in the last year has developed ways to infiltrate and manipulate computer networks around the world in what U.S. defense officials conclude is a new and potentially dangerous military capability, according to a Pentagon report" (Barnes, 2008). China is even placed in relation to al-Qaeda: "Cyber-attacks and cyber-espionage pose a greater

potential danger to U.S. national security than Al Qaeda and other militants that have dominated America's global focus since Sept. 11, 2001, the nation's top intelligence officials said Tuesday" (Dilanian, 2013). This juxtaposition with al-Qaeda only served to heighten the military valence of China's cyber activities, and a push to prepare for such a threat. Indeed, in the words of Senator Bill Nelson (D-FL): "The threat, to be sure, is real—and, we cannot allow ourselves to grow complacent …" (Nelson 2008).

Snowden's revelations of US spying on China in June of 2013 drastically changed the shape of the discussion however. Snowden demonstrated that the NSA (1) had two data centers in China from which it had been inserting spy software into vulnerable computers; (2) targeted the Chinese University of Hong Kong, public officials, businesses, and students; (3) hacked mobile phones; and (4) in 2009, hacked the Pacnet headquarters in Hong Kong, which runs one of the biggest regional fibre-optic networks. In response to Snowden's revelations, a spate of articles compared the United States' and China's hacking, displaying a range of attitudes from journalists—some espoused that both countries demonstrate equivalent transgressive behavior, while others argued that China has crossed the line into more aggressive hacking that goes beyond the United States' more benign "preemptive" hacking.

The latter attitude indicates the resilience of tropes of the Yellow and Red Perils, a China whose inherent ideological and cultural differences with the West makes it a threat. The different lenses through which journalists and pundits viewed China's spying in comparison with that of the United States further invoke this Orientalist demarcation. An article in *The Washington Post* thus contrasts China's behavior against that of the United States, which merely seeks "to examine huge amounts of communication metadata around the world to look for trends" and "to preempt some threat against the U.S." China's spying is described, however, as "infiltrating almost every powerful institution in Washington, D.C.," "breaking into major news organizations," "stealing sensitive military technology," and "stealing so much intellectual property that China's hacking has been called the 'greatest transfer of wealth in history'" (Fisher, 2013). Drawing in particular on incendiary words like "stealing" and "infiltrating," this article distinguishes China as a sneaky thief.

US journalists and pundits, in charging China with stealing economic resources, have further solidified the demarcation of China as an inferior and dangerous Other. A well-circulated quote by national security pundit Adam Segal stated, "The problem is we're not talking about the same things … We're trying to make a distinction between cyber economic espionage and normal political-military espionage. The Chinese don't make that same distinction" (Bengali & Dilanian, 2015). By portraying China as unable to grasp the fundamental distinction between economics and national security, Segal suggests China's thievery is connected to a more fundamental character flaw—China is unable to grasp proper civilized norms. Similarly, US official response has been that China's view of data collection as a sovereign right has rendered them essentially different from the United States and by implication, the civilized world. That Chinese governmental espionage involves the collection of economic intelligence that is shared with Chinese companies further departs from civilized norms. Michael Rogers, Director of the National Security Agency thus explained that "they clearly don't have the same lines in the sand, if you will, with that regard" (Bennett, 2015).

Historically, US depictions of China as uncivilized have occurred whenever China has gained power or threatened US interests. The narrative of China as a sort of child following in the United States' footsteps on the path to modernity has proven exceedingly popular since World War II and frames the US approach to China as a potential ally and resource who at the same time may never be civilizable (Kim, 2010; Vukovich, 2012). In this Orientalist narrative, China's journey to

modernity is always understood as precarious and, moreover, subject to US vigilance as to whether it meets the appropriate benchmarks. The title of an editorial in *The Washington Post* epitomizes current iterations of this sentiment and the ease with which Orientalist imagery can be invoked to portray China's path to modernity as needing US guidance when China falls out of line: "The US Needs to Tame the Cyber-Dragon: Stronger Measures are Need[ed] to Block China's Economic Espionage [emphasis mine]" ("The U.S. Needs to Tame," 2013). In reality, US vigilance can be attributed to the concern since the end of the Cold War, that a "sleeping giant" able to challenge US global hegemony is awakening (Kim, 2010).

Thus, the cultural work done by portrayals of China as unable to adhere to civilized norms serve to bolster the image of China as perpetually unprepared to be a responsible member of the international community. In fact, this narrative of China's thievery serves to persuade the American public that China is a threat to the international community. One *Wall Street Journal* journalist perfectly echoes this sentiment:

> A China that leads the world in the theft of intellectual property, computer hacking and resource nationalism will prove extremely destabilizing. If it continues on this course, Beijing should not be surprised if other countries begin to band together to collectively counter some of the more harmful implications of China's rise. A better outcome for all will be for China to embrace its responsibilities to help lead the world … (Metzl, 2011)

This article, although hopeful that China may at some future point become a responsible global actor, even leader, ultimately reifies the notion that an increase in China's global power is always suspect.

China as lawless bully: maritime disputes

To cheat and thief, we can layer the trope of lawlessness, readily employed in media representations and political rhetoric over maritime territorial and EEZ disputes involving China and its neighbors in the Western Pacific. China's territorial claims in the South China Sea are largely historical in nature and do encroach on the 200 nautical miles EEZ of neighboring countries such as the Philippines and Vietnam. The United Nations Convention on the Law of the Sea (UNCLOS) does not expressly prohibit land reclamation in the sea as long as due notice is given to other concerned states and due regard to the rights of other states (Art. 60.3, 56.2, and 56.3) is taken into account, while the obligation to protect and preserve the marine environment is observed (Art. 192). Parties to a dispute are also obligated to refrain from acting in a manner that would jeopardize or hamper a final agreement resolving the dispute (Art. 74.3 and 83.3). The frantic building of artificial islands to enhance the legality of China's claims, unilateral installations, and skirmishes in the disputed areas are thus amenable to interpretation as lawless bullying. An editorial in the *Wall Street Journal* titled "Calling Out China's Lawlessness; The US Points Out that Beijing's Claims to the South China Sea Don't Stand Up," describes the "sketchy legality of its [Beijing's] actions" and claims that "China is changing the status quo in the South China Sea with force and the threat of force" ("Calling Out," 2014). This characterization in the media is consistent with political rhetoric. US Secretary of State John Kerry was reported to have said in May 2014 that China's "introduction of an oil rig and numerous government vessels in waters disputed with Vietnam was provocative" (Ives & Fuller, 2014). Eliot Engel of the House of Representatives

Foreign Affairs Committee framed China's actions in skirmishes with Vietnam as "needless provocations" (Engel, 2014).

At the same time, media representations and political rhetoric have tended to obscure the fact that China's regional neighbors all built airstrips and outposts on the claimed islands long before China ever did. China also displays inconsistent behavior in that it has reached agreements with Vietnam in the Gulf of Tonkin and South Korea in the Yellow Sea to divide fisheries equally and carry out joint enforcement patrols in keeping with international law.[3] Indeed, China has in land disputes signed "fair and balanced" treaties with 13 out of 14 neighbors in keeping with international legal principles (Kraska, 2015). These instances have not, however, drawn any significant media attention. Instead, the emphasis on China's non-compliance with international law in the South China Sea disputes has served to recapitulate China in Orientalist terms as uncivilized and, moreover, as a fully awakened "sleeping giant" that bullies its neighbors and is unsuited to replace the US as regional leader.

US political rhetoric and media representation has also obscured the vagueness of international law when applied to the East China Sea dispute as it would be inconsistent with the image of China as a lawless bully in the South China Sea. The UNCLOS appears to have a straightforward framework that gives states maritime jurisdiction over resources 200 nautical miles from their coastal baseline, but it says nothing about how overlapping maritime jurisdictions are to be resolved. In the case of the East China Sea, the area of dispute is only 360 miles across at its widest point. At the heart of the territorial dispute between China and Japan is the "territorial acquisition" of the Senkaku/Diaoyutai islands, but there is no convention on how states acquire sovereignty over disputed territories.[4] The flexibility of applicable principles in international customary law have instead allowed both China and Japan to invoke the law to justify their claims to sovereignty (Ramos-Mrosovsky, 2008). China's refusal to have the dispute adjudicated by an international body reflects the unpredictability of outcomes and not necessarily China's lawlessness, especially when viewed, in light of a similar disinterest on the part of the Japanese.

The essentialization of China as lawless, despite the malleability of international law and dissimilar behavior in other disputes, has the potential to drive a wedge between China and her neighbors, thus "containing" China's growing influence in the region. Indeed, the depiction of China as a lawless bully plays up the insecurities of its immediate—and in many cases, much weaker—neighbors, whose heavy reliance on international law to constrain hegemonic behavior is palpable. The breaking of norms has been identified as a crucial signal that heightens threat perception (Farnham, 2003). In the context of long-standing maritime territorial disputes, playing up an image of China as a lawless bully also suggests that the United States continues to be a necessary power broker in the region. The notion that there is an overbearing bully in the neighborhood that could care less about the rules of the game returns the United States to the role of protector in the post–Cold War period—its ostensible "manifest destiny."

Since the late 1990s, titles such as "Spratly Spat Heats up over Chinese 'Bullying'" (Lamb, 1998) or "Asian Nations Support US Silently" (Wiseman, 2001) demonstrate how constructing China as a lawless bully serves to reinforce this purpose. Indeed, a recent editorial in *The Wall Street Journal* makes this link explicit in the text:

> Washington's hesitant response has allowed controversy to build around freedom-of-navigation missions that should be routine. Beijing's strategy in the South China Sea is to bully its neighbors and achieve regional hegemony through coercive means short of war. Turning peaceful naval patrols into diplomatic hot potatoes is exactly the sort of change Beijing seeks. ("A 12-Mile," 2015)

Here, China's behavior is portrayed as incorrigibly belligerent, in distinct contrast to genteel US diplomacy. One *Wall Street Journal* article makes this point clear in its title alone: "Chinese Diplomacy Off Course; By Overreaching in the South China Sea, Beijing has Drawn the US Irrevocably into the Debate" (Wain, 2000). This article embodies the dominant narrative that assumes implicitly the *rightful* role of the United States to dole out proper diplomacy and take on any transgressors to maintain world peace. A *Wall Street Journal* article describing China's "increasingly powerful—but highly opaque—military and its more assertive stance [towards the South China Sea]" emphasize China's military as an inherent threat to world order but construct the US military according to a different standard, again assuming the righteousness of US military intervention (Page, 2011).

In this regard, it is important to note that US grand strategy consists of preventing the development of any regional power capable of obstructing US access to Eurasia—where most of the world's resources and economic activity are located. This long-term security goal has informed the Obama administration's much-touted Pacific Pivot policy, which many have viewed as a "China containment policy." A Congressional Report notes that

> although U.S. policymakers have not often stated this key national strategic goal explicitly in public, U.S. military (and diplomatic) operations in recent decades—both wartime operations and day-to-day operations—can be viewed as having been carried out in no small part in support of this key goal. (O'Rourke, 2014)

China's territorial claims in the South China Sea cover about 90% of the area that could potentially allow China to deny the United States such access. As China continues with the modernization of its naval and air capabilities, US apprehension has increased that the disputed land features in the South China Sea are being used to bolster military and coast guard forces that can monitor and respond to the activities of US allies, deny the US navy access to these waters, and ultimately check US naval dominance in the region.

It is for this reason that the United States has insisted on freedom of navigation and innocent passage—protected by UNCLOS—through these contested waters, although tensions with China have ratcheted up considerably as a result. As direct conflict between the United States and China has become a real possibility, and as the United States has not ratified the UNCLOS, the United States has attempted to base its actions on firm legal principles, and in turn, to frame China's behavior in the region as lawlessness. Through US portrayals of China as a lawless bully, China incurs reputational costs in the global and regional community that have the potential to exert pressure on China to stand down. The guided-missile destroyer USS Lassen was thus sent in October 2015 on a "freedom of navigation" patrol within 12 nautical miles of islands artificially built by China in the Spratly chain, which the United States insists is in compliance with international law.[5] The United States revealed this aim in another dispute on whether China has an international legal right to regulate foreign military actors operating within China's 200-nautical-mile EEZ. The United States' view, which China disagrees with, is that China has a right to restrict military and surveillance activities only within 12 nautical miles of its territorial waters. Tensions reached new heights when China announced in November 2013 an East China Sea Air Defense Identification Zone (ADIZ) that not only covered her territorial waters but extended into its EEZ and thus, the contested areas in the East China Sea. US Secretary of Defense Chuck Hagel responded in a press statement that "We view this development as a destabilizing attempt to alter the status quo in the region. This unilateral action increases the risk of misunderstanding and

miscalculations," yet the United States followed shortly by flying two B-52 bombers through the zone (Harlan, 2013).

Certainly, there have been media analyses that characterize China's behavior as motivated by normal national self-interest or that point out that US actions to curtail China are "hypocritical" and "hegemonic" (see, for example, Denyer, 2015; Wu, 2005). However, many more choose to reprise long-standing debates about whether China is a military threat or not, with titles such as "US Starting to View China as Potential Enemy" (Mann, 1995) and "Weakening Yet Still Aggressive, China Poses Test for U.S. Presidential Candidates" (Sanger, 2015). None take seriously China's claims that its actions in the region have been defensive in nature. Even with a wide range of opinions on the matter, by focusing on the issue of China's military buildup, these news articles only serve to heighten this perceived threat by inferring threatening intent from growing military capabilities.

Political rhetoric tends to contain far less ambiguity, however, some even going so far as to suggest that the United States has been unnecessarily patient toward China. Senator John McCain (2016), Chairman of the Committee of Armed Services, thus commended and encouraged the continuance of the freedom-of-navigation operation of October 2015, adding that "this decision is long overdue." In a keynote speech delivered at the Fourth Annual CSIS South China Sea Conference in 2014, Representative Mike Rogers (R-MI), Chairman of the House Permanent Select Committee on Intelligence further advised that the United States should stop being "deferential" to China's "naked aggression" as it continues to "bully" and "intimidate" its neighbors.[6] Indeed, political rhetoric appears to take China's image as lawless to its logical conclusion—China as the full-fledged threat to regional stability legitimizes any force that the United States might be compelled to take in the future to contain such a threat. Unpacking the great power rivalry in the maritime disputes thus helps us to understand the cultural work that the trope of lawless bully does to bolster the long-term security objectives of the United States in the region.

Conclusion

Peter Hays Gries once suggested that the way Americans view China is most likely motivated by "cold calculations of their own self-interest … intertwined with deep-seated 'gut feelings' about China" (Hays Gries, 2006, p. 209). And while we "frequently infer Chinese intentions from Chinese capabilities," admitting to these features in US policy is something that we are often unwilling to do (Gries, 2006). China has, since the end of the Cold War, occupied a space in the US imaginary as the *potential* enemy Other, and the areas of contention highlighted above have become ample context for the reification of negative images of China as an imminent source of threat. These images have been drawn from older tropes of the Yellow and Red Perils and also newer incarnations of the "sleeping" or "awakened" giant. As previous work has shown, such tropes have the ability to do the cultural work that shapes and justifies US policies (Buzan & Wæver, 2003; de Buitrago, 2012; Steuter & Wills, 2010; Turner, 2014). In the present moment, negative images of China have enabled the justification of an increasingly hardline approach to China. The latest National Security Strategy articulated by the Trump administration has unequivocally named China a challenger to "American power, influence and interests" who has attempted to "erode American security and prosperity" (Landler & Sanger, 2017; U.S. White House Office, 2017), and the United States' hardline tack toward China has been further reflected in the areas of contention in the US–China Comprehensive Dialogue.

We have aimed to interrupt post–Cold War representations of China as a *potential* enemy Other that encourage a reductive attitude toward a "rising China." We have been particularly concerned with how this may disable the US public from fairly evaluating China's actions as a rising power, as well as the US government's policies toward China. Indeed, if China is essentially a lawless bully, a thief, and a cheat incapable of learning international norms of acceptable behavior, what options besides the exercise of hard power does the United States have to meet its long-term security objectives? A treatise on the aims and modes of US national security is beyond the scope of this article, but we hope to at least foreground the way othering frames the "truths" about China, so that the wider public may view US China policy with a more critical filter. The ability of the US public to do so could become increasingly important—diversionary wars have been used as a tactic to shore up public support for unpopular leaders threatened by domestic discontent, after all (Sobek, 2007). Although China's longtime position has been to maintain a strong partnership with the US based on mutual interest, benefit, and respect, it is imperative that the US public understands when US policy encourages China to retreat from that position, and the potential that holds for conflict.

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Notes

1. China is the largest foreign holder of US Treasury securities (US$1.26 trillion as of September 2015).
2. Search terms in relation to China's currency policy: (trade OR currency) AND China AND (US or United States) AND (cheat* OR "by rules"). Search terms in relation to China's cyber intrusions: cyber AND China AND (US OR United States) AND (offensive OR threat OR hacking). Search terms in relation to maritime territorial disputes: "South china sea" AND threat.
3. See Note 2.
4. Under United Nations Convention on the Law of the Sea (UNCLOS), islands generate the same maritime jurisdictional zones as mainland territories as long as they are not rocks which cannot sustain human habitation or economic life of their own.
5. Under the UNCLOS, a state's territorial waters, over which it has sovereign rights, extends to 12 nautical miles from the coastal baseline. The exclusive economic zone (EEZ), within which a state has rights to exploit resources, extends beyond this to no more than 200 nautical miles from the coastal baseline. Under UNCLOS, artificial islands do not extend the territorial waters or EEZ of a state.
6. For videos of these statements, see http://csis.org/event/recent-trends-south-china-sea-and-us-policy.

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Author biographies

Su-Mei Ooi is Associate Professor at the Department of Political Science and Peace & Conflict Studies at Butler University. Her research analyzes the relationship between international and domestic politics in the areas of democratic development, human rights and regional security in Pacific Asia.

Gwen D'Arcangelis is Assistant Professor of Gender Studies at Skidmore College. Her areas of teaching and research include gender, race, and science; feminist science fiction; disease and empire; and feminist and anti-imperial praxis.