

# reflexively

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## English

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### Etymology

*reflexive* + *-ly*

### Adverb

#### reflexively

1. In a reflexive manner.
2. By reflex, automatically, without conscious thought.

***Reflexively** he opened his mouth to breathe, forgetting he was underwater.*

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# reflexive

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See also: **réflexive**

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## English

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### Etymology

From [Medieval Latin](#) *reflexivus*, from [Latin](#) *reflexus*.

### Pronunciation

- enPR: rəflɛkˈsɪv, IPA<sup>(key)</sup>: /ɹəˈflɛksɪv/

### Adjective

**reflexive** (*not comparable*)

1. (*grammar*) Referring back to the subject, or having an object equal to the subject.
2. (*set theory*) Of a relation  $R$  on a set  $S$ , such that  $xRx$  for all members  $x$  of  $S$  (that is, the relation holds between any element of the set and itself).

"Equals" is a **reflexive** relation.

3. Of or resulting from a reflex.

The electric shock elicited an automatic and **reflexive** response from him.

4. (*figuratively*) Producing immediate response, spontaneous.

a **reflexive** dislike

5. Synonym of reflective

## Antonyms

- irreflexive, non-reflexive, nonreflexive

## Derived terms

- reflexive verb
- reflexive pronoun
- reflexivity

## Related terms

- (*set theory*): symmetric
- (*set theory*): transitive
- irreflexive

## Translations

### in grammar

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>▪ Belarusian: <u>зваротны</u> (zvarótny)</li> <li>▪ Bulgarian: <u>възвратен</u> (bg) (văzvráten)</li> <li>▪ Catalan: <u>reflexiu</u> (ca)</li> <li>▪ Czech: <u>zvratný</u></li> <li>▪ Dutch: <u>wederkerend</u> (nl)</li> <li>▪ Faroese: <u>afturbendur</u></li> <li>▪ Finnish: <u>refleksiivinen</u> (fi)</li> <li>▪ French: <u>réfléchi</u> (fr)</li> <li>▪ Georgian: <u>უკუკცევი</u> (ukukceviti)</li> <li>▪ German: <u>reflexiv</u> (de)</li> <li>▪ Greek: <u>αυτοπαθής</u> (el) (aftopathís)</li> <li>▪ Icelandic: <u>afturbeygður</u> (is)</li> <li>▪ Irish: <u>aisfhillteach</u>, <u>frithluaileach</u></li> </ul> | <ul style="list-style-type: none"> <li>▪ Persian: <i>please add this translation if you can</i></li> <li>▪ Polish: <u>zwrotny</u> (pl)</li> <li>▪ Portuguese: <u>reflexivo</u> (pt)</li> <li>▪ Romanian: <u>reflexiv</u> (ro)</li> <li>▪ Romansch: <u>reflexiv</u></li> <li>▪ Russian: <u>возвратный</u> (ru) (vozvrátnyj), <u>рефлекси́вный</u> (ru) (refleksívnyj)</li> <li>▪ Scottish Gaelic: <u>ath-fhillteach</u></li> <li>▪ Serbo-Croatian: <ul style="list-style-type: none"> <li>Cyrillic: <u>повратан</u></li> <li>Roman: <u>povratan</u> (sh)</li> </ul> </li> <li>▪ Slovak: <u>zvratný</u></li> <li>▪ Slovene: <u>povraten</u></li> </ul> |
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- Japanese: 再帰的 (saiki-teki)
- Macedonian: рефлексивен (refleksiven)
- Mongolian: эгэх (mn) (egeh)
- Norwegian: refleksiv (no)

- Spanish: reflexivo (es)
- Swedish: reflexiv (sv)
- Turkish: dönüşlü (tr)
- Ukrainian: зворотний (uk) (zvorótnyj)

#### in mathematics

- Czech: reflexivní (cs)
- Finnish: refleksiivinen (fi)
- German: reflexiv (de)
- Icelandic: sjálfhverfur, spegilvirkur
- Japanese: 反射的 (はんしゃてき, hanshateki)
- Polish: zwrotny (pl)

- Portuguese: reflexivo (pt)
- Romanian: reflexiv (ro)
- Russian: рефлексивный (ru) (refleksívnyj)
- Slovene: refleksíven
- Swedish: reflexiv (sv)
- Tagalog: pabalik

#### resulting from a reflex

- Czech: reflexivní (cs)
- Greek: αντανακλαστικός (el) (antanaklastikós)

## Noun

**reflexive** (*plural reflexives*)

1. (*grammar*) A reflexive pronoun.
2. (*grammar*) A reflexive verb.

## Translations




**reflexive pronoun** — see reflexive pronoun

**reflexive verb** — see reflexive verb

## See also

- (*verb*): active, passive, neuter, transitive, intransitive

## Further reading

-  reflexive on Wikipedia.
-  Reflexive pronoun on Wikipedia.
-  Reflexive verb on Wikipedia.

## German

## Pronunciation

- Audio (file)

## Adjective

### reflexive

1. *inflection of reflexiv*:

1. *strong/mixed nominative/accusative feminine singular*
  2. *strong nominative/accusative plural*
  3. *weak nominative all-gender singular*
  4. *weak accusative feminine/neuter singular*
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## Latin

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### Etymology 1

#### Adverb

**reflexivē** (*not comparable*)

1. *reflexively*

### Etymology 2

#### Adjective

#### reflexīve

1. *vocative masculine singular of **reflexivus***
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**REFLEXIVITY IN INTERNATIONAL CONTEXTS:  
IMPLICATIONS FOR U.S. DOCTORAL STUDENTS  
INTERNATIONAL RESEARCH PREPARATION**

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**ABSTRACT**

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Aim/Purpose	Learning to conduct research, including considerations for concepts such as reflexivity, is a key component of doctoral student preparation in higher education. Yet limited attention is given to doctoral student training for conducting international research, particularly in understanding researcher reflexivity within international contexts.
Background	Incorporating reflexive practices in one's scholarship is of particular importance because international research often includes U.S.-based researchers working with cultural groups and contexts that are very different from them. Thus, we examined the following: how do novice U.S. trained researchers understand the role of their reflexivity in qualitative international research?
Methodology	We utilized qualitative inquiry to answer the study's research question. In-depth, semi-structured interviews were conducted with 22 participants representing 11 higher education doctoral programs in the United States.
Contribution	This study provides insight on how U.S. doctoral students reflect on their researcher reflexivity as emerging international researchers utilizing three types of reflexivity as outlined by the conceptual perspectives that frame this study: introspection, social critique, and discursive deconstruction
Findings	Most participants believed that self-reflection is a critical component of reflexivity in international research. Several participants demonstrated an awareness of the privilege and power they bring to their international research based on their identities as Western-trained researchers. Participants utilized different forms of self-reflection when collecting, analyzing, and interpreting their data in

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	order to ensure that the voices of their participants were appropriately represented in their research
Recommendations for Practitioners	Our recommendations for graduate preparation programs include helping doctoral students to understand reflexivity as both a <i>research concept</i> and an <i>applied practice</i> in international context.
Recommendation for Researchers	We recommend that novice researchers learn how to incorporate reflexive practices when conducting research because as emerging scholars they can have a better sense of how who they are and how they think about research influences their research activities.
Impact on Society	Implications from this study affect Western-based education programs that seek to internationalize curriculum and research priorities.
Future Research	In terms of next steps, we recommend research that explores how faculty train doctoral students to participate in the global contexts of educational research.
Keywords	doctoral education, internationalization, reflexivity, research training, higher education

## INTRODUCTION

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Higher education has become increasingly interconnected and international. As a result, higher education institutions in the United States have experienced increased student mobility, collaborative research projects, and global knowledge exchange (Altbach & Knight, 2007; Altbach & Teichler, 2001; Knight, 2015). In response, U.S. institutions have added coursework that emphasizes internationalization in both masters and doctoral education degrees (Comparative and International Education Society, n.d.; Drake, 2011), underscoring the importance of infusing international perspectives in graduate education.

As emerging researchers, doctoral students must be prepared to conduct research that considers increasing global knowledge exchange. Given the amplified internationalization of higher education, there is a need for doctoral student researchers to be trained to work within international contexts; however, limited attention has been given towards the international preparation for nascent researchers in doctoral programs (Yao & Vital, 2016). This is of particular importance because international research often includes U.S.-based researchers working with cultural groups and contexts that are very different from them. In addition, international research includes the danger of methodological nationalism. Methodological nationalism is a concept in which researchers focus only on the boundaries of one's nation-state (Chernilo, 2006; Shahjahan & Kezar, 2013), leading to an imbalance of power within the research relationship. Thus, researchers must be aware of the lens and perspective they use in an attempt to understand these different cultural contexts.

In research, the consideration of a researcher's lens is often discussed as researcher reflexivity and positionality. Reflexivity is defined as "a way of emphasizing the importance of self-awareness, political/cultural consciousness, and ownership of one's perspective" (Patton, 2002, p. 64), all of which are relevant to international research. Reflexivity works in tandem with positionality, which is described as how researchers are situated. Understanding where the researcher stands "in relation to 'the other'" (Merriam et al., 2001, p. 411) is considered when questioning one's positionality during the research process. Simply said, reflexivity is an internal understanding of one's perspective, and positionality is how one is positioned in contrast to those being studied.

Although there is an abundance of literature on the importance of reflexivity and positionality (Glesne, 2011; Merriam et al., 2001; Patton, 2002), there is limited discussion on how doctoral students are trained to approach and conduct international research. Thus, we examine the following:

how do U.S. doctoral students understand the role of their reflexivity in qualitative international research? This study provides insight on how U.S. doctoral students reflect on their researcher reflexivity as emerging international scholars.

This study emerged from a larger project that examined doctoral students' perceptions of their preparation for international research. As we coded participant interviews, themes related to reflexivity and positionality continuously emerged from participants' experiences. In this paper, we provide a brief overview of current literature on the importance of researcher reflexivity in international research. We then outline our methods used in this study, including our own personal reflexivity statements. We illuminate findings from the participants and conclude with a discussion and implications for practice and future research.

## **THE ROLE OF REFLEXIVITY IN RESEARCH**

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Reflexivity is commonly addressed in qualitative methodology as a way to reflect on one's own position. In doing so, the researcher engages in the practice of self-reflection in order to better understand how a researcher's lens affects the research project, particularly because qualitative research often includes interactions with participants. Reflexivity allows for the inclusion of why and how a researcher gathers data so "that our work can be understood, not only in terms of what we have discovered, but how we have discovered it" (Etherington, 2007, p. 601). Therefore, reflexivity in qualitative research allows for two essential parts: one part on your actual project and the other part on you and "the ground on which you stand" (Glesne, 2011, p. 126).

Beyond self-reflection, reflexivity also requires high levels of connection with participants. Reflexivity "requires researchers to come from behind the protective barriers of objectivity" (Etherington, 2007, p. 599) and, as a result, researchers can connect with others as a way to humanize and relate to participants in the research relationship. The invitation to others allows for an interactive relationship when practicing relational reflexivity (Hibbert, Sillince, Diefenbach, & Cunliffe, 2014). Relational reflexivity prioritizes a connectedness between researchers and participants in an attempt to build theory "through engaging otherness and enacting connectedness" (Hibbert et al., 2014, p. 292). By doing so, the practice and idea of reflexivity is more inclusive of the participants and their communities, particularly those who come from different cultures and backgrounds.

### ***REFLEXIVITY IN INTERNATIONAL RESEARCH***

Researcher reflexivity has been increasingly important because of the growing emphasis on internationalization and global perspectives in academia (Altbach & Knight, 2007; Altbach & Teichler, 2001; Knight, 2015). International research has raised additional considerations related to methodological considerations and researcher reflexivity. For example, Rubinstein-Avila (2013) problematized the challenges raised in cross-cultural/linguistic qualitative inquiry in her own work as a U.S.-based scholar conducting research in South America. Based on her own experience, researchers, particularly those in international settings, should be cognizant of their own hermeneutic horizon, which "includes their past and present, professional, community and person experiences" (Rubinstein-Avila, 2013, p. 1047). Furthermore, one's hermeneutic horizon is dynamic and by being exposed to individuals from different cultural and linguistic backgrounds, researchers' knowledge and experiences are enhanced, which increases one's "proficiencies and historical consciousness" (Nguyen as cited in Rubinstein-Ávila, 2013). Rubinstein-Ávila (2013) offered three perspectives for consideration for cross cultural research, which may lead to the researchers "explicitly questioning their data and the conclusiveness of their findings" (p. 1042). The three perspectives are broadly described as embracing the everyday happenings in the field, continuous contextual and methodological reflexivity, and cross-cultural/linguistic translations and interpretations.

Reflexivity in global contexts is important because international fieldwork is affected by the intersections of difference, inequalities, and geopolitics (Sultana, 2007). Thus, positionality, or how a re-



researcher's reflexivity is positioned in relation to others, is critical in ethical considerations of qualitative research. For example, Sultana, a U.S.-trained researcher born and raised in a modern city in Bangladesh, conducted her dissertation research in rural Bangladesh where community members treated her as both an insider and an outsider. Specifically, the community members considered Sultana an insider, or as a member of their community, and an outsider who represented a U.S. educational training that contrasted greatly from her participants' lived experiences. Ethical research requires the consideration of how power and subjectivity are situated within and around the international fieldwork. Thus, intersubjectivity, similar to relational reflexivity, is key to navigating within international communities while attempting to reconcile formal institutional norms of academia (Sultana, 2007). Reflexivity and positionality are essential in international fieldwork because "the production of knowledge and the power relations that are inherent in research processes in order to undertake ethical research" (Sultana, 2007 p. 382) should always be at the foundation of the researcher's project.

Reflexivity can be a helpful tool for understanding and applying ethical considerations to qualitative research (Guillemin & Gillam, 2004). Researchers can utilize reflexivity as a "sensitizing notion that can enable ethical practice to occur in the complexity and richness of social research" (Guillemin & Gillam, 2004, p. 278). International research is complex, with challenges ranging from language differences, cultural contexts, and relationship building with translators and boundary spanners. Thus, engaging in introspection and awareness as a component of reflexivity may assist in transparent and ethical research practices. The act of being transparent with the research process "calls for a positioning of reflexivity not as clarity, honesty, or humility, but as practices of confounding disruptions" (Pillow, 2003, p. 192). By embracing reflexivity, researchers allow for emancipation of the self and understanding of the studied population when navigating international contexts.

## CONCEPTUAL PERSPECTIVES

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Our study is framed by Finlay's (2002) discussion on the role of reflexivity in qualitative research. Finlay noted the challenges associated with reflexivity in research and the importance of the researcher "negotiating a path through this complicated landscape" (p. 212) and, by virtue of the journey, the researchers making "interesting discoveries" during their research activities (p. 212). Finlay developed a classification, or maps, of five types of reflexive practices reflected in contemporary qualitative research: introspection, intersubjective reflection, mutual collaboration, social critique, and discursive deconstruction. These five perspectives of reflexivity in qualitative research can overlap or be used at the same time by the researcher. For the purpose of this study, we describe all five perspectives yet only focus on three of the five types of reflective practices based on findings that emerged: reflexivity as introspection, social critique, and discursive deconstruction.

Explaining reflexivity as introspection, Finlay (2002) noted "insights can emerge from personal introspection which then forms the basis for a more generalized understanding and interpretations" (p. 214). Introspection should not only be viewed as self-reflection, but also as an opportunity to become "more explicit about the link between knowledge claims, personal experiences of both participant and researcher, and the social context" (Finlay, 2002, p. 215).

Reflexivity as intersubjective reflection refers to when researchers "explore the mutual meanings emerging within the research relationship" and at the same time "focus on the situated and negotiated nature of the research encounter" (Finlay, 2002, p. 215). Involving more than reflection, this perspective is underscored by the researcher focusing on the "self-in-relation-to-others [which] becomes both the aim and object" of the analysis (Finlay, 2002, p. 216). The researcher considers the potential challenges within the research relationship while "looking at both inward meanings and outward into the realm of shared meanings" (Finlay, 2002, p.18) in order to examine the research relationship and the potential challenges that may arise with the participant.

When describing reflexivity as mutual collaboration, Finlay (2002) explained that collaborative reflexivity “offers the opportunity to hear, and take into account, multiple voices and conflicting positions” (p. 220). By incorporating the voices of the researched in the process of self-reflection, the researcher acknowledges that the research participant is also a “reflexive being” (p. 218) who mutually contributes to the data analysis component of the research process (Finlay, 2002).

Power imbalance can exist between researchers and those they research based on their social positions at the time of the research. A concern for researchers who use reflexivity as social critique is determining how to “manage the power imbalance between researcher and participant” (Finlay, 2002, p. 220). By incorporating a social critique in one’s research reflection, the researcher is able to acknowledge and address the “social construction of power” (Finlay, 2002, p. 222) and the positionality of the researcher and the research participant during the research process.

In reflexivity as discursive deconstruction, “attention is paid to the ambiguity of meanings in language used and how this impacts on modes of presentation” (Finlay, 2002, p. 222). Because language itself, the use of certain language, and the emphasis on certain aspects of language represents those being researched, the researcher will have to contend with representing the “dynamic, multiple meanings embedded in language” (Finlay, 2002, p. 222) used during the research process. In other words, the researcher will have to carefully deconstruct what the participant said while ensuring the language used does not lose its meaning during the researcher’s interpretation and representation of what was said.

## METHODS

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This study emerged from a larger study that examined doctoral students’ perception of their preparation for international research. We utilized qualitative inquiry to answer the larger study’s research question: what are doctoral students’ perceptions of their preparation for conducting research in international contexts? After extensive coding and refining of themes, findings related to this study emerged and provided insight on how U.S. doctoral students reflect on their researcher reflexivity and positionality as emerging critical international scholars. In addition, although we asked questions about research in general, the findings related to this current study emphasized the importance of international qualitative field work and research.

Interviewing participants was the most appropriate mode of inquiry because it helped us to better understand their lived experiences (Charmaz, 1996) as doctoral students, which emerged from the interviews. Further, this qualitative method helped us to examine doctoral students’ perceptions on how prepared they believed they were for conducting qualitative international research and allowed us to ask follow up questions regarding their positionality and reflexivity. Semi-structured interviews allowed participants to further detail their individual unique experiences at their respective institutions.

### *PARTICIPANTS*

Participants were recruited via a listserv from a national association for the field of higher education. Selection of participants was a result of purposeful sampling, which is used when “the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned” (Merriam, 2009, p. 77). Recruitment emails were sent in spring of 2015 and 2016 to eligible participants who were current members of an international special interest group within a higher education association. We also utilized snowball sampling (Patton, 2002) when participants would recommend additional participants who met our study criteria.

We interviewed 22 participants (see Table 1) representing 11 different higher education doctoral programs in the United States. Each participant chose his or her own pseudonym to use in this study. Eighteen of the participants identified as women and/or female. Nine of the participants identified as international students, meaning they were born and/or raised in a country outside of the United

States. Of the nine international students, two became naturalized U.S. citizens. As a result of our participants' broad range of backgrounds and experiences, we were able to collect rich data, which is characterized by situating the complexities of participants' lived experiences within the contexts of place and time (Given, 2008). As a result, the richness from the interviews has increased the trustworthiness of the data collected (Glesne, 2011).

We recognize that that the international student participants had different perceptions on the meaning of "international research;" thus, we clarified that we were interested in experiences that were facilitated by their graduate program. By doing so, we feel that we were able to get to the core element of our study, which was understanding how doctoral students perceive their preparation for conducting international research. In addition, all of the domestic study participants had at least one experience outside of the United States, either related to their prior and/or current academic experiences such as study abroad or for personal travel.

**Table 1. Participant Demographics**

<b>Pseudonym</b>	<b>Year in program</b>	<b>Student status</b>	<b>Anticipated job after graduation</b>	<b>Gender</b>	<b>Race/ethnicity; national origin</b>
Lydia	1	Full time	Faculty	Female	African American
Jiaoyu	5	Part time	Faculty	Female	International/East Asian
Marie	2	Full time	Policy	Female	International/South American
Ashley	4	Full time	Practitioner, Policy	Female	Black; Naturalized citizen
Onay	2	Full time	Scholar-practitioner	Female	International/South Asian
Snoopy	3	Full time	Faculty	Male	Asian
Jenny	5	Full time	Administrator	Female	African American; Naturalized citizen
Katherine	3	Part time	Policy	Female	White
Belle	2	Full time	Scholar-practitioner	Female	Black
Sonia	2	Full time	Policy	Female	International/South Asian
Priya	2	Full time	Faculty	Woman	Indian-American
Ron	3	Full time	Administrator	Male	White
Steve	2	Full time	Administrator	Male	White
Kate	3	Full time	Faculty	Female	Caucasian
Frank	2	Full time	Faculty	Cis-gender male	White
Tatenda	2	Full time	Policy	Female	International/Black African
Vanessa	5	Full time	Administrator	Female	White; Naturalized citizen

Pseudonym	Year in program	Student status	Anticipated job after graduation	Gender	Race/ethnicity; national origin
Talya	4	Full time	Faculty/Researcher	Female	Bi-racial
Carl	3	Full time	Administrator	Female	Black American
Betty	1	Full time	Administrator	Female	International/East Asian
Jenna	1	Full time	Undecided	Female	International/East Asian
Sydney	4	Full time	Faculty	Female	Black

### *DATA COLLECTION AND ANALYSIS*

In-depth, semi-structured interviews were conducted with each participant either by phone, Skype, or Google Hangout during the 2015 and 2016 spring semesters. All the data collected was transcribed on an ongoing basis, including details on dates, pseudonyms, and any other notes that we took during and after the interviews. After transcribing, we used a coding scheme as outlined by Miles, Huberman, & Saldana (2013).

We utilized deductive coding, which includes a “start list” (Miles et al., 2013, p. 81) based on this study’s research questions, interview protocol, and conceptual framework. We first searched for broad categories and then developed themes that emerged from the participants’ experiences. Themes were coded by identifying appropriate phrases that related to our themes. We organized the first cycle codes by clustering them under common themes or patterns that emerged from the interviews. After concluding first cycle coding, we moved on to second cycle coding, which is “a way of grouping those summaries into a smaller number of categories, themes, or constructs” (Miles et al., 2013, p. 86). This was an iterative process of reflecting and clustering codes into code categories. We continuously refined the pattern codes until we felt the final codes were representative of the participants’ experiences. Common themes that emerged from the findings included the role of personal identity in research, the importance and process of reflection, and “me-search” as research. We then utilized Finlay’s (2002) maps on types of reflective practice as a way to organize findings into coherent and systematic clusters.

### *TRUSTWORTHINESS AND VALIDITY*

We collected rich data and used thick description (Glesne, 2011), which includes presenting the “voice” of the participants, utilizing thick detailing of questions and answers, and reflecting on our personal reactions to all interviews (Ponterotto, 2006). In doing so, we increased the trustworthiness of the qualitative data collected. Our findings are based on the raw data that we collected and the exact quotes from our study participants. By utilizing multiple data sources, 22 participants and two investigators, we were able to triangulate our data, which is an effective strategy for confirming findings (Merriam, 2002). By using investigator triangulation, we were able to gain additional insights as two investigators who bring “different perspectives and different epistemological assumptions” (Given, 2008, p. 893) to the process of analyzing data. We also reviewed the interview transcripts multiple times to ensure we were capturing the full narratives of the participants and to reduce any misunderstandings in our analysis. This reliability procedure contributed to the trustworthiness of our findings (Creswell, 2007).

In addition, we consulted with scholars of international higher education when conceptualizing our study and later after collecting our data. When discussing our research project, we also shared the process by which we collected our data. We also conferred with our peers proficient in qualitative

research who critiqued our findings and provided alternative viewpoints. These discussions with experts in the field helped us to confirm that our “tentative interpretations” (Merriam, 2002, p. 31) were appropriate and congruent with the themes that we identified from our findings.

Reliability often lies within the researcher who is the primary instrument for data collection. The investigators’ positionality was used as a form of reliability (Merriam, 2009). As the researchers, we were aware that our own biases, values, and perspectives influenced our research lens; thus, our reflexivity affected how we made meaning of participants’ worldviews. We recognize that because this study emphasizes the importance of reflexivity, it is imperative that we share and emphasize our own reflections on our positionalities as researchers.

### ***RESEARCHERS’ REFLEXIVITY***

The first author identifies as an U.S.-born first-generation Chinese-American. The first author attended a doctoral program that had touted a heavy international emphasis; however, after completing her dissertation, she was left wondering if there was more training that could have guided her through her internationally-focused dissertation. This question led this author to develop this study in collaboration with the second author of this study. The first author’s research was on the experiences of Chinese international students, which led to significant self-reflection on her positionality as a U.S. born researcher. In addition, the tension of conducting interviews in English with non-native English speakers led her to consider the layers of power and privilege in using a dominant language in research.

The second author identifies as Haitian-American. She is a first-generation American as her parents immigrated to the United States from Haiti over forty years ago. The second author attended the same higher education doctoral program as the first author. When preparing to travel to Haiti to conduct her dissertation research on a higher education centered organization in the country, the second author began to examine her doctoral experiences and in particular questioned her preparation to conduct international research. While in Haiti, the second author reflected quite a bit on her role as a researcher with an insider (Haitian ethnicity) and outsider (U.S. nationality) identity in relation to her research participants.

## **FINDINGS**

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All participants were asked questions related to their positionality when conducting international research and how they incorporated reflexivity in their research in order to answer the question: how do U.S. doctoral students understand the role of their reflexivity in international research? Our findings revealed that graduate students were grappling with their roles as researchers in an international context and with the notion of incorporating reflexivity when conducting international research. The findings revolved around the main themes of our conceptual perspectives in which Finlay (2002) mapped five types of reflexivity found in qualitative research, all of which may overlap or be used at the same time by the researcher. In the subsequent sections, we expand on our findings by emphasizing three of the five types of reflective practices based on our findings: reflexivity as introspection, social critique, and discursive deconstruction.

### ***REFLEXIVITY AS INTROSPECTION***

Introspection was the most discussed aspect of reflexivity from participants. Most participants emphasized their beliefs in how self-reflection was a critical component of reflexivity in international research. For example, Snoopy shared his personal experiences with how he reflected on his approach to research in China:

I think just reflecting back and thinking I have a relationship toward my own personal interaction toward people and from talking to teachers, educators in China, about some of the issues that are happening such as teaching and learning or in engagement or even the high

stakes examination. That kind of helps me kind of reflect back to see how does that—how does this research topic that I’m hoping to create has an affect towards the future or in terms of what I hope to achieve with this project that I’m designing.

Similarly to Snoopy, Belle also reflected on her own personal background and interactions with others to examine her own positionality in research. She described her introspection with, “In terms of self-awareness, this research comes from a seed that is from within me. So, I feel like it is out of my own way of sort of understanding myself in relation to the world in some sense.” Belle believed strongly in how her own identity as a Black woman affected her approach to research. She continued to elaborate, stating:

I think if you start there and then the terms of the act of reflexivity in the research, how I’m going to collect data and being self-aware in that process. I also have to recognize a lot of it is connected to me personally but I also want to know, I want to learn things. So I am inquiring about some things that are interesting to me that are connected to me but I also don’t understand. So it’s sort of like a part of me but not at the same time which is kind of weird.

Belle’s introspection permeated most aspects of her approach to research because her identity affected how and why she conducted her international research. Talia agreed about the role of personal values affecting research. She personally had not yet had the opportunity to conduct international fieldwork, but was able to describe how she would approach introspective reflexivity when she did go abroad. She stated:

I would like to think I do more like anthropological iterative process. You know, so yes, you’re collecting interviews, observations, what not but in addition, I always memo to myself, you know, like feelings and to try to elucidate like why I’m thinking in a particular way. Where my values come in and how that might shape research questions or contexts I seek to look at. And how that actually shapes my research agenda. It has to be throughout the entire research process and as opposed to trying to resolve the issue because I don’t believe there’s ever a way of getting away from being, you can’t just say if I do all this, then I can leave it and then just collect the data. No. It’s like something you’re constantly grappling with.

Talia believed that researchers must “grapple” with self-reflection throughout the entire research process. Jenny’s experience was similar, and when asked how she engaged in reflexivity, she shared:

I think something that works for me is what is my research question? Because that would help me to give my focus at what I want to achieve with that research. So I look at my research questions to help me define how I want to be in that space. And then it would help me to understand why do I want to do this research, what is my ultimate goal? What do I want to achieve, what do I want people to learn from my research? And I think that for me whenever I was starting with my doctoral research I had to work with my professor and a couple other colleagues to try to see how I can make that question clear.

Jenny continued to describe how she thought about gathering her data, sharing her internal process:

Then how do I go about gathering my data to make sure that maybe I don’t put myself into it, but try to work with other people who would help me to bring about what I want to achieve. So I think it depends on the question and such question and what I want to achieve the goals, what I think it a good or the reason for the research.

Like Talia’s “grappling” with the influence of her lens, Jenny would consistently return back to her foundation, which is the research question. Other participants were able to describe their process for introspection a little bit differently. For example, Kate would engage in the process of self-reflection, but also found value in reflective discussions with others. This is in contrast to other participants who, like Steve, would journal as a way to reflect. As indicated by participants, introspection could be achieved in multiple ways.

### ***REFLEXIVITY AS SOCIAL CRITIQUE***

Reflexivity as social critique addresses the power imbalance between the researcher and the researched. Several participants discussed their awareness of the privilege and power they brought to their international research based on their identities as Western-trained researchers. For example, Vanessa, when asked about how she engaged in reflexivity, voiced her concerns as a U.S.-based researcher:

I think one of my biggest, usually my kind of the biggest concern when I do international research is that it's very Western focused on the frameworks, ideally American and my political background. Because of the program that I'm, because of the readings I have done in the U.S. it's usually more U.S. focused so it takes an effort to see through other perspectives to look, you know, connect with framework and kind of find something that also has been written about the same topic in India, can I see—you know—European perspective or Australian or not simply just fall into this U.S. theoretical framework which comes naturally because that's what we read here and that's what we talk about in our coursework.

Vanessa was very aware of her lens as a U.S.-trained doctoral student, and continued to explain how she reflected on her positionality in international research:

I think that would be the one area where I know I'm very conscious of the theoretical framework, also other ways the questions can be asked. Do I have biases in the questions I ask, you know does it kind of confirm, confine me to my specific I would say U.S. type of framework? Am I missing something because of the frameworks I'm using because of the questions I'm asking? So those things are certainly on my mind when I do international research and I try to dig deeper, you know, read more, talk to people

As a result of her educational training, Vanessa was aware of the potential power dynamics embedded in how she engaged with her non-U.S. participants. Part of her reflexive process was questioning her own lens and how it may influence how she interacts with her participants.

When reflecting on her positionality, Priya discussed the research relationship in the context of national identity and how those dynamics can influence the research relationship. She explained:

I think about what does my, what do my privileges as American born and educated mean in the context of working with international students. I've thought a lot about this idea of the other or me otherizing people by engaging in the research. And so what does that mean, how do I minimize that? That's one area that I think a lot about.

Frank, who identified as a gay, White cis-gendered man, spoke extensively about how his background affected his interactions with others. Like Priya, he was particularly focused on his privilege as a U.S. citizen, and he shared:

I would describe my positionality as overall very privileged, again my Whiteness, my maleness, my cis-ness. My socioeconomic background, but I'm also gay right? So I think that tends to be the single salient identity for me. Especially being at a Predominantly White Institution, like I don't have to think about my race. I really don't have to think about my maleness. So I do have to think about my sexuality. But I also think that I rarely if ever have to think about my citizenship. And so I think like that's something that I really need to flesh out and think about and articulate, but I have a lot of privilege again living in the United States. So what would that mean for the rest of my research and how I navigate in a country other than the United States, I'm not sure.

Although Frank claimed a marginalized identity as a gay man, he realized that his U.S. citizenship allowed a privilege that would provide him access and power to navigate other countries. He openly shared that although he had an interest in international research, he had not conducted any formal

research in global contexts at the time of his interview. However, he did share that he had been reflecting extensively on the power and privilege inherent in his identities.

Interestingly, Marie had a very different experience related to social critique as she was the one seemingly with less power in the research relationship. Marie, in her second year of her doctoral program, shared her personal experience when interviewing scholars and policy makers. She was very aware of the power dynamic implicit in international research. She stated:

There's a big issue in terms of gender because, especially policy makers, highly ranked officials are mostly men—older than me. I'm a woman, a younger woman and a PhD student so then there's always an issue there that's really challenging every time I try to gather data. Or try to do an interview with someone. So that is really something that I need to address. So far, I don't have a sense of how to overcome that, but that's one of the issues.

Marie was explicit with how her gender, age, and status as a student affected her interactions with policy makers who are predominantly men. She continued to describe how she engaged in self-reflection when faced with an unbalanced power dynamic by stating:

That is something that of course I have been trying to write that down to really be self-aware and try that that doesn't affect the results of what I gather—the questions I ask. How do I react to what people say?

As indicated by Marie, these participants engaged in the social critique aspect of their reflexivity. Although Marie's personal experience was a little different from Vanessa and Frank, they all were cognizant of the power dynamics in their research process.

### ***REFLEXIVITY AS DISCURSIVE DECONSTRUCTION***

Discursive deconstruction refers to researchers understanding that language is ambiguous, and reflection during and after their research activity can be helpful for interpreting the voices of their research participants. Some of the participants in this study discussed the notion of “reflexivity to deconstruct” (Finlay, 2002, p. 224) as they thought about their own research projects. Onay shared that journaling helped her in this process:

I tend to journal extensively and write free notes. I tend to read them every day and go back if I do an interview. I did a project in Pakistan over the summer and once I'm done with the interview I will come back and I will read it again and the question I am asking myself is, how much...like am I asking the questions I already know the answer to, you know? Where am I coming in here? How much more...is there too much of me and not enough of the interviewee coming in. So I think it's that process of constantly being aware of who you are and what you bring to the project and then checking and seeing, do I have the voice of the person that I needed? You know, talking to the interviewee again and saying, here's what I got from our interview together, does this make sense to you? I think those are the kinds of things that help you just be aware that it's...it is doing something together rather than doing something on your own.

Similarly, Sydney talked about her research and the importance of reflecting on her process of collecting data and the importance of reviewing her data to ensure that she understood the meaning of the data collected. She explained:

So in one of the articles that I read, one of the authors talked about how some folks who present their research, their focus on research presented still in terms of this participant said this and this participant said that and then that participant said that. That's problematic for focus group methodology because what this author is arguing is that it's the interaction between group members and the meaning that is actually generated as a result of them interacting with one another. And so making sure that when I present the research data from the focus group, I am going to follow through the interviews where I can kind of individually



talk through things, but making sure that the how is just as important as the what. So I'm still kind of thinking through this, but that's kind of how I, that I'm going to do for my dissertation, but also has me thinking a little bit more about how I'm going to be doing—making sure that I'm intentional about paying as much attention to the process as I am to the actual data that's collected in my future work. And also making sure that it's culturally responsive and culturally responsible.

Katherine had also just begun her research activities as an early career doctoral student. Like Sydney and Onay, she also discussed the need to reflect on how she would understand the perspectives of those she interviewed:

So I'm just starting out and my approach is thinking through as I do it, so I started doing some sort of pilot interviews to figure out where I'm going and I'm trying to figure out how to really draw out someone's experience while also figuring out how I decide—kind of understanding their worldview. But I think I'm still kind of thinking through it as I get some of the data.

Katherine described how she believed she would approach reconciling the cultural differences with her participants as she made meaning of their experiences and worldviews. Frank similarly discussed his approach to international research, emphasizing the importance of mutual meaning making. Frank shared:

Because I'm looking for mutual understanding between me and the research participant. Right? Like some sort of mutual concepts, maps I guess. Something that we can share and know exactly what we're meaning. So I look at the language that I use because I think the language and rhetoric are always there and they're always doing something so I want to make sure my language and rhetoric are doing what I want them to do.

Frank reflected heavily on how he presented his questions and information because he knew the impact that discourse could have on the participants and their data. He continued with how discursive deconstruction affected his approach to data analysis by stating:

Obviously as soon as the data comes in I'm already analyzing it in some way. Maybe not like explicitly, but I'm listening to it or hearing it or I'm seeing the responses and I try to, I try to write down or record my initial reaction. And then I try, to go through them, I try to go from the most literal interpretation to maybe the more symbolic in their responses and see how it all fits together.

When Talia discussed her own research process, she shared how important self-reflection was to her data analysis and that writing reflective memos helped her with interpreting her data. She expounded:

So I think that like you have to just remind yourself to do that work. You know, I think a lot of people think it's so easy to do research on other people because you're just blindly collecting data, but you're not realizing how your interpretation is actually affecting that data collection process. So just, you know, memoing helps myself a lot because then I can put it, like what day was I observing? Okay, so this is what I thought I collected and this is how I was feeling. Like how did that impact that? And looking back and what not. So yeah, definitely an iterative cycle which is great.

These study participants all discussed the need for self-reflection when collecting, analyzing, and interpreting their data in order to ensure that the voices of their research participants were appropriately represented. They believed that by doing so, they would be better able to represent the multiple meanings in language and experiences that commonly exist in international and cross-cultural interactions.

## DISCUSSION

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The majority of the participants discussed the role reflexivity plays in their research endeavors and almost all of them highlighted the importance of reflexivity as introspection. The process of reflecting inwards, or on the self, was exhibited in multiple ways including reflecting through journaling and by participating in reflective conversations. The participants had various reasons for introspection as well. For example, Belle said that her reflexivity in research was “sort of understanding myself in relation to the world in some sense.” Similarly, Talia shared that she reflected on her research process in order to understand “where my values come in and how that might shape research questions or contexts I seek to look at.” Both Belle and Talia engaged in introspective reflexivity in order to understand who they were in relationship to their studied population.

Glesne (2011) noted that reflexivity in qualitative research allows for two essential parts. One part is the act of conducting the actual project, which both Belle and Talia reflected on when discussing their international research. The second part of reflexivity in qualitative research emphasizes your reflections on “the ground on which you stand” (Glesne, 2011, p. 126). By reflecting on their own identities and perspectives, both Belle and Talia attempted to make sense of how their positions as researchers influenced their research activities. This underscores Rubinstein-Avila’s (2013) writings on qualitative inquiry, which emphasized that researchers should be cognizant of their “past and present experiences” (p. 1047) when conducting research in international settings.

Reflexivity as introspection allowed Snoopy and Jenny to think about how they approached international research. When discussing his research process, Snoopy questioned, “how does this research topic that I’m hoping to create [have] an affect [on] what I hope to achieve with this project that I’m designing.” By asking this question, Snoopy was getting closer to understanding how he influenced his own research. Similarly, Jenny shared that her research questions helped her to understand why she wanted to do her particular research and to define who she wanted to be in her research space. As Etherington (2007) described, reflexivity is useful so “that our work can be understood, not only in terms of what we have discovered, but how we have discovered it” (p. 601). By considering their methodological choices, both Snoopy and Jenny were able to make sense of their decision making in their research process.

Some of the participants discussed the role of power and privilege in their research experiences, which highlighted reflexivity as social critique in qualitative research. Vanessa, Frank, and Priya reflected on their U.S. academic training and citizenship and American identity and how it influenced their thinking about their research endeavors. Finlay (2002) explained that by incorporating social critique in one’s research reflexivity, the researcher is able to address the social construction of power that exists in the world. For example, Vanessa questioned how as a U.S.-based researcher, she automatically imposes a Western framework on research in and on other countries. Vanessa underscored the bias that is often inherent in U.S. research training, which brings to focus the potential of methodological nationalism (Chernilo, 2006; Shahjahan & Kezar, 2013). Thus, reflexivity as social critique can counter the negative effects of researchers only using epistemologies that are based on their own training in U.S.-based doctoral programs.

Research conducted in global contexts is influenced by the intersections of difference, inequalities, and geopolitics (Sultana, 2007). Just as Vanessa was concerned by her U.S. academic training and lived experiences, Priya was concerned about the privilege associated with her American identity and how it would influence her own approach to research. She shared her concern of “othering” her research participants and asked “what do my privileges as American born and educated mean in the context of working with international students?” This was a critical question to ask because as Finlay (2002) highlighted, a concern for researchers who use reflexivity as social critique is determining how to “manage the power imbalance between researcher and participant” (p. 220). Marie had a different concern regarding the research relationship and pondered how her gender, age, and status as a student affected her interactions with policy makers who are predominantly men in her research loca-

tion. In this instance, the power imbalance favored the research participant rather than the researcher, and Marie had to make sense of how she would address this concern prior to working in the field.

Vanessa, Priya, and Marie each had to contend with the interpersonal aspects of their research endeavors in relation to their own identities and how that impacted their participants. The process of reflexivity in the backdrop of social critique was a critical component of their research process because they could not change their own identities, and at the same time, they could not change the power imbalance that was embedded in the research relationship. Power imbalances are inherent in international research (Sultana, 2007), and this study's participants were able to make meaning of their own privilege and power by acknowledging the realities of power dynamics that may exist.

In addition to social critique, several participants shared the importance of reflexivity as discursive deconstruction due to language differences with participants. Language differences emerged in multiple ways, including meaning making and approachability of the research protocol. For example, Onay and Katherine both highlighted the importance of their participants' voices and their worldviews. By "constantly being aware of who you are," Onay was able to question, "do I have the voice of the person?" By highlighting the voice of their participants, Onay and Kate were able to ensure careful representation of participants' meanings. In doing so, they engaged in ethical reflexivity as a way to grapple with the complexities of social research (Guillemin & Gillam, 2004).

Another aspect of reflexivity as discursive deconstruction included how researchers presented themselves to their participants. Frank and Sydney both discussed how they made sense of the data, particularly with the role of verbal interactions. For example, Frank was very conscious of how his language and rhetoric affected his interactions with participants. He was aware of his "own hermeneutic horizon" (Rubenstein-Avila, 2013, p. 1047) and how that affected his approach to participants. Discursive deconstruction appeared to work in tandem with reflexivity as social critique, particularly in relation to international contexts of research. The issue of language requires a consideration of the power implicit in academic jargon and potentially even in the English language. Thus, intersubjectivity, as discussed by Sultana (2007), is critical in navigating international communities as a U.S. trained scholar. As indicated by our participants, engaging in reflexivity as discursive deconstruction, social critique, and introspection are all effective ways in beginning to address the effects of power and politics when conducting international research.

## IMPLICATIONS FOR PRACTICE

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Implications from this study affect Western-based education programs that seek to internationalize curriculum and research priorities. As such, doctoral students must understand that there are multiple ways of producing knowledge, particularly when considering international contexts. By having an understanding of their positionality and incorporating reflective processes when conducting research, emerging scholars can have a better sense of how who they are and how they think about research influences their research activities. Many of the participants interviewed in this study were beginning to understand reflexivity as both a research concept and an applied practice in international context.

Reflexivity as a research concept would include international researchers considering multiple methodological decisions (Rubenstein-Avila, 2013), including cultural norms, socio-historical factors, environmental contexts, and demographic considerations such as gender and age. Reflexivity training has implications for graduate preparation programs, including how doctoral programs can include reflexivity and positionality in the curriculum as an applied practice. By including these concepts in researcher training courses, doctoral students will have an understanding of how their own lived experiences, whether consciously or subconsciously, shape and influence their research decisions. As a result, faculty would need to take the lead on engaging students in considering how one's ontological view can shape the approach to international engagement. For example, faculty could incorporate classroom activities that would facilitate conversation amongst students about their own backgrounds and how that could affect their interactions with future research participants. By doing so, students

would have the opportunity to engage in both introspection as well as collective knowledge building with their classmates and faculty.

Another implication for graduate preparation programs would be an emphasis on the role power and privilege plays in international research. For example, researchers' nationality, academic training, and language abilities are factors to consider in preparing doctoral students to conduct cross-cultural research. Students could engage in discussions on how to navigate these challenges and opportunities, both in and out of the classroom. We recognize that not all research training occurs within the confines of a classroom; rather, learning can take place in other venues, such as departmental brown bags, webinars, and study abroad preparation meetings. This also contributes to doctoral students understanding that reflexivity is both a research concept and an applied practice. Brown bags and webinars can engage students in multiple topics, including the practical functions of research as well as contextual information about research locations. For example, a brown bag can be facilitated by several researchers who have experience in a specific region of the world and as such, can speak to the nuances of engaging within those cultures. As a result, students will gain increased understanding of the socio-historical contexts of their research sites that goes beyond what can be learned in a book or in journal articles. This understanding is especially important when considering the power imbalances related to gender, language, race, religion, and ways of knowing, all of which permeates multiple cultures around the world.

We recommend that early career researchers pay close attention to these recommendations for practice as a way to prepare themselves for the realities of international research. Although much of the responsibility for research training falls on the shoulders of doctoral programs and faculty, doctoral students and early career researchers have the responsibility to engage in opportunities that may develop their cross-cultural and international understanding of research. In doing so, individuals can avoid methodological nationalism in their approach to their researched international populations and communities, which may include disparities based on power and position.

We understand that power imbalance in research relationships can occur no matter the research context or location, as noted by Marie's concern regarding her gender, age, and student status in her research project. Thus, we recommend that doctoral students take the time to interrogate their own identities while in research training courses and in other informal opportunities. By doing so, students will be better prepared for the various forms of power dynamics that they may encounter in international settings. Reflecting on one's identity would enable researchers to make meaning within research relationships. As a result, ethical practice could emerge within the complexity of international research (Guillemin & Gillam, 2004). Reflective practices could be included in coursework and during conversations with research supervisors and dissertation advisors. With these interactions, students can engage in introspective reflexivity as a way to deepen their awareness of their international research. Cross-cultural research necessitates the critical component of reflection, including U.S. based researchers who are studying other cultural contexts.

## LIMITATIONS

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Several limitations exist for this current study. First, the participants were interviewed at one point in time during their doctoral program. Although our study provided our participants the opportunity to reflect on their experiences in that moment of time, it did not evaluate any changes that could potentially occur as they progressed in their doctoral programs. Also, our participants were current students, which means that they may not have much research experience. In addition, participants in this study represent multiple stages in their doctoral program, from first year students to doctoral candidates in their final year. Further, our participants represent only students in higher education programs, which limits applicability to other disciplines outside of education.

## RECOMMENDATIONS FOR FUTURE RESEARCH

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Recommendations for future research include interviewing current faculty to better understand how they train doctoral students to engage in reflexivity. Specifically, we recommend research that explores how faculty train doctoral students to participate in the global contexts of educational research. An examination of both curriculum and pedagogy would provide increased understanding of international researcher preparation.

Another recommendation would be to probe deeper into each aspect of reflexivity. Our findings include only three of the five types of reflexive practices as outlined by Finlay (2002). Closer examination of each aspect of reflexivity would contribute greatly to both the current literature as well as applied practice for reflexivity. We are particularly interested in the role of reflexivity as social critique as there is increased attention on power, privilege, and inequalities in international education and research. Emphasis on understanding reflexivity as social critique could assist in addressing and problematizing the power dynamics that are inherent in international and comparative research.

## CONCLUSION

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This qualitative study provided insights on 22 higher education doctoral students' perspectives on reflexivity and positionality in international research. We questioned, how do U.S. doctoral students understand the role of their reflexivity in international research? As indicated by the findings, doctoral students in this study utilized reflexivity as introspection, social critique, and discursive deconstruction, primarily through examination of their own personal identities and how their individual identities affect their approach to international qualitative research.

Although reflexivity is a key component of researcher preparation, more attention needs to be given to the different aspects of reflexivity and how they can be used in international contexts. The participants in this study indicated that the three paths to reflexivity often work in tandem with each other when considering international contexts, much of it due to the issues of power dynamics between the researcher and researched. Thus, additional considerations must be given by doctoral preparation programs to supporting doctoral students and their reflective practices in international education and qualitative research. As indicated in the findings, many of the participants in this study were beginning to understand reflexivity as both a research concept and an applied practice in international context. As such, doctoral programs and early career researchers must engage in the process of reflexivity to move towards being better prepared for international research.

Although this study focused only on participants in higher education programs, we would argue that all disciplines are affected by increased internationalization. As such, doctoral students from various disciplines and backgrounds should be engaging in the process of reflexivity in their research process. International research, as indicated by participants in this study, includes issues of power and personal identity. Thus, doctoral programs of all academic disciplines have a responsibility to engage students in reflective research practices that are necessary for their successful entry in today's global academy society.

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# Practising reflexivity: Ethics, methodology and theory construction

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## Abstract

Reflexivity as a concept and practice is widely recognized and acknowledged in qualitative social science research. In this article, through an account of the ‘reflexive moments’ I encountered during my doctoral research, which employed critical theory perspective and constructivist grounded theory methodology, I elaborate how ethics, methodology and theory construction are intertwined. Further, I dwell on the significance of reflexivity, particularly in qualitative research analysing bioethics concepts. Through an account of the universal ethical principles that ‘I’, as a researcher, encounter, and a micro-analysis of the observed relationships that influence the theoretical construction and arguments developed, I explore the quandaries an ethics researcher undertaking a reflexive approach faces. I elucidate that reflexivity unveils – for both researcher and reader – how the researcher(s) arrive(s) at certain positions during the knowledge construction process. I conclude by stating that reflexivity demystifies the moral and epistemological stances of both the study and researcher(s).

## Keywords

Reflexivity, ethics, constructivist grounded theory, methodology, bioethics, qualitative research

## Manifestation of reflexivities

The concept of ‘reflexivity’ has been central to academic discussions of knowledge production for many decades (Charmaz, 2006; Charmaz and Mitchell, 1996; D’Cruz et al., 2007; Etherington, 2004; Finlay and Gough, 2008; Gergen and Gergen, 1991; Hammersley and Atkinson, 2007). In academic theses and articles it has become a ‘ritual’ to include an explicit discussion of the researcher’s positionality and its influence on the research. Reflexivity is intended to function as an evaluating scale which ‘measures’ the quality and rigour of qualitative research (Cohen and Crabtree, 2008; Hall and Callery, 2001; Jootun et al., 2009; Koch and Harrington, 1998; Sandelowski, 1993). It has transformed the question of subjectivity in research from a problem to an opportunity and has been conceptualized from various perspectives within diverse disciplines and studies which acknowledge its influence on the research process (Finlay, 1998; Finlay and Gough, 2008; Gentles et al., 2014; Guillemin and Gillam, 2004; Pillow, 2003; Stronach et al., 2007). Of late, the concept of reflexivity and its importance has gained significance within the field of bioethics research also (Corrigan, 2003; Dunn and Ives, 2009; Hedgecoe, 2004; Ives, 2014; Ives and Dunn, 2010). While the need for reflexivity in qualitative

studies has long been acknowledged, in the recent years there has been an increasing focus on the question of how to practise reflexivity (Etherington, 2004; Finlay and Gough, 2008; Ives and Dunn, 2010). Researchers employ reflexivity in their research by drawing on different traditions, and there have been diverse variants of reflexivity (Finlay, 2002; Finlay and Gough, 2008; Hertz, 1996; Mauthner and Doucet, 2003; Neill, 2006; Pillow, 2003). While providing an account of different variants of ‘reflexivity’, Finlay and Gough (2008) acknowledge the blurred borders among the variants and the overlaps. Within these diverse forms of ‘reflexivities’ one can identify how reflexivity is practised and adopted: who practises ‘it’; what the research is ‘on’; and what the researcher’s agenda ‘is’. Each researcher embarks on their reflexive journey by giving significance to what they think is crucial to their research (Bradbury-Jones, 2007; Carter and Little, 2007; Damsa and Ugelvik, 2017; Guillemin and

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Gillam, 2004; Hammersley and Atkinson, 2007). Many have argued that it is inevitable, and essential, for researchers to be self-reflexive (Etherington, 2004; Finlay, 1998; Hertz, 1996; Lumsden, 2013; Lynch, 2000; Venkatesh, 2013; Walsh, 2003). Reflexivity has also been argued to be a methodological tool to account for the situated and embodied nature of knowledge production (Etherington, 2004; Le Grand, 2014; Pillow, 2003). Instead of labelling the different variations of 'reflexivity' and discussing them within the narrow boundaries of each variation, I illustrate my own journey of reflexive research through certain 'reflexive moments' – significant experiences and reflections at certain stages of research which helped me reconstruct the research journey in a better way. By doing this, I offer a discussion of how the reflexive approach was understood and employed in the process of my doctoral research; how it helped in knowledge production; and how I *experienced* reflexivity and navigated through various phases of my research.

This article is a result of my epistemological and methodological stance of employing a reflexive approach in my doctoral research and consciously treating reflexivity as a *practice* of doing research rather than an academic virtue or source of authority over knowledge. I argue that examining ethics or the moral concepts in ethics research requires a critical and reflexive approach towards one's moral, epistemological positions and their influence on research. I focus on the ripple effect of reflexivity within constructivist grounded theory (CGT) methodology combined with a critical theoretical paradigm and present the ethical quandaries in the relationships between the researched and the settings, as well as within 'oneself' as a researcher. In my doctoral research, I adopted a broad contextualized approach to examine the ethical principles or values of the concept of 'informed consent' in clinical practice within elective clinical surgery and court judgements in consent cases of medical negligence in the Indian context. Examining the ethical principles or values of a concept like 'informed consent' involves understanding the moral values, beliefs, assumptions and practices of individuals, institutions and social context. In the context of the 'empirical turn' in bioethics research, I highlight the significance of reflexivity, and offer an account of practising reflexivity. I present my reflections based on my observations and in-depth interviews conducted as part of my doctoral research at hospital settings (government and private) during the period February 2016 to July 2017 in Chennai, a metropolitan city in south India. The study was conducted after obtaining approval from the Ethics Committees of both hospitals. The research involved a total of 63 in-depth interviews with patients and family members, surgeons and nurses; and observations during data collection at the in-patient wards, corridors, lawns, parks, canteens and waiting rooms.

I have structured this article interlocking personal, methodological, and theoretical reflexivity. I have divided the article into three parts. In the first, I offer a narrative of my own practice of reflexivity, or rather how I 'encountered

reflexivity' during the course of my research. I present my research journey in the form of a confession tale (Van Maanen, 2011) as it plays a significant role in construction and co-construction of knowledge. While I am aware that, I am acknowledging authority over my research by employing reflexive approach, I believe that it is important to be aware of and reflect on the knowledge construction process while doing research where we have epistemic authority and responsibility. Here I provide only a partial picture, through a discussion of certain 'reflexive moments'. However, it does not mean that other moments are insignificant (O'Reilly, 2012). It is me, the researcher, who designates certain moments as 'reflexive moments' based on the recurring significance of the experience in my journey, both past and present. In the second part of the article I discuss how taking a reflexive approach has influenced my epistemological and methodological stances. I discuss particular reflexive moments which present my thoughts, ethical quandaries, and relationships while carrying out critical CGT research and the influence these moments have had in directing and constructing moral and theoretical arguments. Finally, I briefly discuss the significance of reflexivity within qualitative bioethics research.

### **Reflecting on the journey: when did reflexivity start to matter?**

The moment of self-awareness happened in my journey as a qualitative researcher when I was a research associate in a project studying patient autonomy in the Indian context. 'Something', for which I did not yet have a name, started bothering me while I was engaged in field work, interviewing general physicians on patient autonomy. The process of listening to doctors, while conducting interviews for the project, made me reflect on my own experience as a patient as well as a caretaker in hospital settings. My personal experiences within medical institutions influenced the nature of the interview guide and questions. This left me pondering over the following questions: should my personal stories or experiences influence the way I conduct research?; and would taking such an approach not affect the methodology and theoretical direction? As I was part of a team which had members with diverse epistemological and methodological positions, I could not engage in reflexivity while undertaking that project. However, when I joined the doctoral programme, after completing the project, the questions that arose in my mind during the earlier fieldwork resurfaced. These questions, along with my central research questions on the concept of 'informed consent', continued to disturb me. While identifying a particular methodological approach for the study, my epistemological inclinations directed me towards CGT methodology (Charmaz, 2006, 2008, 2011). As CGT acknowledges a researcher's experience and encourages reflexivity, I consciously started practising reflexivity during the research process.

## Past and present: personal stories and research questions

In the later part of this article, I provide an account of the reflexive moments and experiences I encountered during my research. At this stage, it is important to provide some details on my socio-economic and geographical location to situate my-self, and my arguments. I was raised in a lower middle class, non-upper caste Hindu family in a semi-urban area. I have chosen the self-description 'non-upper caste' instead of stating whether I belong to an intermediate caste, or a lower caste, as my personal experiences do not neatly fit into any of these categories. Put differently, I was raised in a household which struggled financially, one that could not afford 'good' schools or colleges. We did not spend weekends in malls or cinemas or take summer vacations, which were all seen as 'urban childhood dreams'. While growing up, all I aspired to was to earn a comfortable income and save some money to take care of my family. I am a cis-gendered female who grew up in the outskirts of Bangalore, without much exposure to or awareness of exploring other sexualities. Now I live in the heart of the city of Chennai, a metropolitan city in south India where I have access to contemporary arts, culture and opportunities to be part of political debates. I have had the privilege to pursue doctoral research in one of the elite institutes of India. I have indeed benefitted from privileges associated with my gender, class, caste and opportunities to reach this position, though it involved diverse negotiations within both academic and social spaces. As is the case with anyone else, I too can be considered both privileged and underprivileged, depending on the context and parameters.

### *Reflecting on my stories/experiences*

To understand a researcher's relationship with social structures and institutions, it is important to explore his or her personal stories/histories (Kanpol, 1997). We play diverse roles in our lives – mother, sister, daughter, friend, citizen, government servant, etc. During the course of my research, the major recurring roles I had to reflect on were those of 'patient' and 'caretaker' within the Indian healthcare system. As mentioned earlier, during my research in the field of medical ethics, along with exposure to critical theoretical literature and ethical theories, my experience as a patient and a caretaker has had immense impact on my reflexive thoughts. In what follows, I offer an account of certain experiences, with a reflection on each role. This is followed by an account of how these reflections influenced my research questions and perspectives.

Medical institutions and stakeholders significantly influence the experience of being a 'patient' and 'caretaker'. There were multiple instances when I was either a 'patient' or a 'caretaker'. However, here I narrate a few of my encounters with healthcare professionals and the healthcare system. Since being a 'patient' and a 'caretaker' play a significant

role in our reflexive position, a reflexive account of my experiences can provide a lens for understanding the research questions of my study. On being diagnosed with Polycystic Ovarian Disease (PCOD), I visited a doctor in a government hospital in Chennai for further consultation. I had read some articles on PCOD prior to the meeting with the doctor. I asked the doctor certain questions about my health condition. She gave very little information about the issue and treatments available; the more I inquired, the more she became annoyed, and showed her reluctance to engage in a conversation. Her expression seemed to convey to me: 'How dare you question me?' and 'Don't irritate me with "stupid" questions'. She asked me in an evidently irritated tone, 'Is it Dr. Google that you trust?' She prescribed me some medicines and quite authoritatively told me just to take those medicines and continued to give instructions on the dosage and so on. Overall, I felt rushed by the doctor and felt that there was very limited space for me, as a patient, to communicate with her. I was left with an authoritative order that demanded that I accept her within the given medical setting and health care system. The other incident which I recall was when I was a 'caretaker' in a partially government funded private hospital in Bangalore. My father had to undergo coronary angioplasty and I was the one taking care of paying the bills, interacting with the doctors and nurses and other administrative errands. My mother and I would anxiously try to approach the doctors and nurses to get updates on my father's health. However, the hospital staff seemed to avoid interactions, gave curt replies without divulging too many details or would avoid answering altogether, all the while maintaining a strong power distance.

When I discussed my initial research proposal on 'informed consent' and my own experiences with friends and colleagues, they too recalled similar instances. Sharing my experiences and listening to others' experiences became part of my research journey. A recurrent theme that emerged in these narratives was that of doctors being authoritative and powerful, on account of their knowledge, skills and their privileged roles. Further, through reading various studies, I came to the understanding that it is not just doctors who come across as authoritative, but that medicine itself as a system perpetuates certain power structures and hierarchies (Foucault, 1973; Gutting, 2005; Jones and Porter, 2002; Lindenbaum and Lock, 1993; Lupton, 2012). I also recognized that the socio-political context in a particular society plays a significant role in shaping the individuals in that society (Annandale, 1998; Nettleton, 2006). Some of the questions that emerged in this context are as follows. Does every communication in the relationship between the doctor and the patient or the caretaker have some element of dominance? Do patients trust doctors and why? Do they consent to surgery because of trust, authority, autonomy or simply as a ritual? Which values will be preferred when the patient is a consumer or a client? How does Indian medical law understand the meaning of doctor-patient relationship and informed consent? Do doctors provide

material information on alternative choices of treatment and discuss risks? If not, why? These questions that emerged out of my personal experiences and experiences during my earlier fieldwork heavily influenced the research questions for my doctoral research. It is from them that I finally arrived at the following research objectives for my doctoral research:

To explore the meaning of ‘informed consent’ among surgeons, nurses, patients, and family members’ within hospital settings, and

To examine the ethical and legal principles or values of ‘informed consent’ in the Indian context.

I wanted to show the relationship between the personal experiences of the researcher (i.e. me) and its influence on the research questions and the underlying analytical framework researchers adopts to build their theoretical arguments.

### **Reflexivity on epistemological and methodological stances**

Given the kind of experiences I had encountered at both public and private hospitals and my reflections on these, I decided to undertake research on how the concept of reflexivity was understood in both types of institutions. I also wanted to explore if there was any difference in the understanding and implementation of the concept of ‘informed consent’ due to differences in institutional structures and power dynamics. Further, based on my analysis within the realm of judiciary, I realized that the concept of ‘informed consent’ is consciously sidelined by the Indian judiciary in favour of the concept of ‘real or valid consent’ (Subramani, 2017). This analysis provided me with a further critical lens to understand the concept studied within the field of law and in clinical practice. As mentioned earlier, CGT acknowledges researchers’ experiences and interpretations and provides space for discussion from a critical perspective, a concern I was preoccupied with in my study (Charmaz, 2006, 2011, 2017). Kathy Charmaz’s work on grounded theory methodology significantly influenced the theoretical framework and approach of my doctoral research. I argue that ‘consent’ is a process which has to be understood within the subjective meanings of constructed reality, and not as a process within an ‘objective world’. Within a positivist framework, researchers focus on an objective understanding of informed consent, and there is no room for constructed knowledge as perceived by the researcher and the researched. I believe that aiming for objective truth fails to capture the rich complexities of our lived experiences and their assigned meaning, leading to a failure in adequately understanding the concepts or the phenomenon (Birks and Mills, 2011; Clark et al., 1991; Charmaz, 2006, 2011; Mills et al., 2006). Since the aim was to explore the meaning of the concept of ‘informed consent’ and its’ underlying ethical principles or

values in the Indian context, the constructivist approach, rather than a positivist one, was an apt framework. I found Charmaz’s CGT as the appropriate methodology to address my research questions. I adopted Charmaz’s theoretical stance of constructivism, which, according to her, is ‘a social scientific perspective that addresses how realities are made’. Thus,

... this perspective assumes that people, including researchers, construct the realities in which they participate. Constructivist inquiry starts with the experience and asks how members construct it. To the best of their ability, constructivists enter the phenomenon, gain multiple views of it, and locate it in its web of connections and constraints. Constructivists acknowledge that their interpretation of the studied phenomenon is itself a construction. (Charmaz, 2006, p. 187)

I situated my research within a critical theoretical perspective, which identifies and gives significance to the social institutions and power differences which shape the meanings that people experience and live with (Gergen, 1999; Hacking, 1999; Holstein and Gubrium, 2008). Consequently, I adopted constructivism and critical theory as my epistemological and theoretical perspectives because I believed these could help me rethink my/our perceived social reality and question the current practices (Blumer, 1986; Bryant and Charmaz, 2007; Charmaz, 2011). From the relativist epistemological stance that CGT adopts, I believe that there are multiple constructed social realities and participants, researchers, and their experiences are part of the process of constructing meanings (Charmaz, 2000, 2006, 2011, 2017). This approach illuminates the researcher’s position and their contribution and critically engages with concepts and helps researchers to scrutinize their actions within the research settings and context (Charmaz, 2006, 2015). By being reflexive to the methodology I had intuitively adopted owing to my constructivist proclivity, I was attentive to the claims of relativism that CGT may evoke within moral knowledge debates. From a relativist epistemological stance, I believe that how we construct understandings from the experiences and how meanings are shaped in research, ultimately constructs the theoretical and moral conclusions and arguments of the concept studied. In my study, I have attempted to analyse the ethical principles or values of the concept of ‘real or valid consent’. Hence the reflexive understanding of the influence that relativist epistemological stance and CGT have on examining the underlying ethical values or principles helped me identify both its appropriateness and limit. For instance, I asked whether findings and analysis of constructed understanding alone can decide the ‘ethical’ value which needs to be endorsed in the context of the study. Critical reflection on this question leads to moral epistemological questions, which I, as a qualitative ethics researcher, have been grappling with. While my focus is on identifying and examining the concept of ‘consent’, on reflecting upon my methodology I strongly believe that it should not result in my arguments being located

or contextualized and labelled under 'cultural relativism or ethical/moral relativism'. In short, the fact that concepts and meanings are constructed within particular contexts should not stop us from questioning the values attached to the concept within a particular context. I adopt this methodology to provide an account of the constructed meanings and take further steps to question the existing practices by inclining towards a meta-ethical position of ethical universal framework (Buss, 1999; Darwall, 1977, 2006; Entwistle and Watt, 2013; Hill, 1991; Macklin, 1999; O'Neill, 1998). In my study I attribute significance to the constructed meanings of the concept of 'consent', but at the same time critically analyse the moral concepts and ethical principles which are at stake and then identify the particular ethical value which I endorse and justify it in my theoretical arguments. Practising reflexivity within the critical theory perspective and CGT on the process of identifying the ethical principles or values demystify the moral epistemological claims which qualitative ethics research brings. However, it also opens up further challenges of larger moral epistemological issues such as: does reflexivity questions objective moral truths? Is there moral reality or truths? How can a researcher attain it? Though these questions are discussed in larger moral philosophy and meta-ethics, within bioethics one should dwell on the questions of 'moral knowledge' as different researchers take different epistemological stances in research while arriving at moral and normative conclusions.

### **Practising reflexivity: intersection of methods, methodology, theory and moral arguments**

There are quite a few studies which address the question of how to be reflexive and how to practise reflexivity (Berger, 2015; Doucet and Mauthner, 2002; Engward and Davis, 2015; Guillemin and Gillam, 2004; Hertz, 1996; Ives, 2014; Mauthner and Doucet, 2003). Some of these studies adopt the practical model developed by Alvesson and Sköldbberg (2004) to be considered in research (Engward and Davis, 2015). While this model would help the researcher to reflect methodically, I believe that it is of paramount importance for any researcher to be conscious of the suggested reflexive steps. Rather than following the principle of reflexivity methodically, in this article I attempt to capture certain 'reflexive moments' during my research and to illustrate through these experiences the intertwining relationship of method, ethics and construction of theoretical or moral arguments. As mentioned earlier, my research questions and approach were shaped by my personal, theoretical and epistemological stances. I have drawn my understanding of the research concept from diverse theoretical approaches – from the disciplines of ethics, bioethics, philosophy, anthropology, sociology and health services research. This was coupled with influences of critical theory and qualitative traditions. I began my doctoral research with a methodology that encouraged

examining perceptions and meanings of the concept of 'consent' within a theoretical understanding that embraces the need to respect patients and patients' family members within the Indian context. My theoretical arguments took new directions, as a result of personal, institutional and theoretical influences during various phases of my research. To illustrate how a reflexive approach and personal experiences influenced my fieldwork experiences, method and theoretical framework, and its inter-linking relationship, let me offer a brief account of the reflexive moments I encountered during the stage of data collection.

As gatekeepers, who are a part of the research process, play a significant role in determining access to participants of the research, researchers are expected to develop and sustain cordial relationships with them. Different type of gatekeepers grant different levels of access: primary gatekeepers connect the researcher to secondary level gatekeepers who then help the researcher to directly access participants for their research (Pellatt, 2003). During my research, I encountered gatekeepers at multiple levels such as the members of Ethics Committees that granted permission to access hospitals; surgeons who introduced me to the hospital staff; nursing director of the private hospital who introduced me to a group of nurses; the dean of the government hospital; practising post-graduate (PG) doctors; nurses, etc. As part of my data collection, I wanted to interview patients and their families within the hospital settings. There was no easy way to meet patients in their respective wards or rooms – each hospital had a different mechanism to access participants. The hierarchy and power dynamics within each hospital were structurally different. An important factor that determined how I gained access to the patients to carry out interviews was how I, as a researcher, inserted myself into these power dynamics, by negotiating and taking advantage of the situation. In the government hospital, the director is at the first level of gatekeeping. As soon as I got clearance from the director, I gained unhindered access to patients in three wards (General Surgery, Obstetrics and Gynaecology and Orthopaedics). The second level gatekeepers are the senior nurses on duty in particular wards. As far as I understood from my observations, senior nurses have a greater say on the question of access to the ward during most of the time, except when the doctor on duty visits the ward. Doctors visit the wards only during particular hours and do not spend much time in the ward. It is worth stating here that the visual image that corresponds with the term 'ward' is that of a huge rectangular room with around 20 beds in two rows, with no curtain between the beds. The letter from the director was a powerful tool for me to gain access to any place in the hospital, within the stipulated boundaries, and establish connections and thereby gain access to patients and their family members in the government hospital. During my initial interviews with patients, nurses were also present. Even though I knew (from existing literature on social power of health practitioners and from my experiences) that the presence of nurses might affect the nature of the data, I went

ahead with the interviews in their presence as I was yet to decide on my strategy of data collection. My questions to the patients were apparently overheard by other patients, as well as the nurses. Soon I realized that the responses to the interview questions given by the patients and their family members were very positive and their views were similar in nature, the reason for which could be the presence of nurses. The interviews were a platform for the patients and family members to point towards each nurse they liked and state that they received good care from them. While I do not doubt the positive relationship they professed to have with the nurses, the interviews conducted in the corridors or lawns where nurses were not present were more revealing in nature. For instance, the family members of patients expressed their dissatisfaction with the service rendered. It appeared that the domineering presence of the nurses and overhearing other patients' responses led patients to narrate their experiences in a similar manner (Hollander, 2004; Kitzinger, 1994; Lehoux et al., 2006). Upon reflection, I decided to change my method of data collection to avoid such influence. As I did not have any control over the physical structure of the ward, and the way people interacted there, I changed my approach to the patients and the method of collecting data. I requested the details of patients who had either undergone surgery in the previous week or were to undergo surgery in the coming week. After going through these details, I arbitrarily chose (using convenience sampling) the patients to meet in each ward and made sure that their neighbouring patients would not be part of any subsequent interview. Individuals quite often tend to agree with a view expressed by a large number of people. This is often underpinned by the power dynamics within the system and relationships. In my case, this power dynamics was determined by the individual patient's relationship with the gatekeeper (the nurse) and other patients who would judge the 'the respondent/ patient' based on their responses (Carey and Smith, 1994; Crotty, 1998; Hollander, 2004).

While the hierarchy and power relationships were similar in nature in the private hospital, my channel to the patients/family members was different. One of the surgeons from the General Surgery department, who is also part of the Hospital Ethics Committee, introduced me to the practicing PG surgeons and asked them to facilitate my research process. In the private hospital, separate rooms were allotted to each patient and family members were allowed during visiting hours. Because of the structure of the hospital, with individual rooms for patients, patients had more privacy to share their views. The hospital had five floors, with each floor housing one or more specializations. Patients were admitted in each floor depending on the specialty care required. Each floor, octagonal in shape, had nurses' desk at both sides. Some rooms were divided with a screen/divider, and could accommodate two patients and their caretakers. Learning from my earlier experiences at the government hospital, where the relationship between the gatekeeper and the participant adversely affected the interview process, I wanted to

avoid any such influences during my interviews. I asked my liaising PG surgeon to provide the details of patients so that I could make a selection from it and meet those patients directly without involving the gatekeeper who was a PG Surgeon. When I started the process of the first interview at the private hospital, I was standing hesitantly at the door of a patient's room. As I stood in front of the room door which had the basic details of the patient labelled on it, I found myself asking: Should I enter? Isn't it the patient's private space? I was not sure if I was supposed to seek permission before entering the room. I recalled a personal experience that I had as a dental patient at the hospital on my campus. I had an appointment with a dental doctor for my toothache. During my dental examination, which was in a closed room, a woman entered along with a child. From the conversations between the attending physician and the 'intruders', I quickly understood that the woman who had entered the room was the doctor's colleague – a nurse from the same hospital, and the child was her son. While I was keeping my mouth wide open, the doctor turned towards the child to examine him and gave prescriptions, which took almost 10 minutes. This incident left me surprised and angry. I remember thinking whether it was my exposure to bioethics literature in general and to concepts like patient's rights, autonomy, privacy and so on that prompted such a feeling in me. While I felt that as a patient I deserved some respect, I also acknowledge – based on my field observations at government hospital and my personal experiences in small private and government hospitals in Bangalore and Chennai – that this is how it is in this particular context and setting. When people know each other, they tend to assume an increased degree of familiarity, and it is not uncommon to extend a special treatment to an acquaintance or a friend, this is observed in healthcare system (Lewis, 2006). The problem here was that the special treatment was at the cost of treading upon the patient's respect. The following questions lingered in my mind: do these incidents go against the concept of respect of patients? If the patient was not me, and someone who was older and a male, would the situation have been different? Moreover, since I was a student and was consulting at the campus hospital, was I seen as a marginal figure? Overall, this incident led me to reflect on how culture, power and relationships work within the hospital settings and how these may affect the way concepts like respect and patients' privacy are understood.

With my personal experience at my institute hospital at the back of my mind, I decided against walking directly to the room to respect the patient's privacy. I requested a junior nurse to introduce me to the patient as a researcher working with the permission of the hospital authorities, and the attending physician of the particular patient. I decided to choose a junior nurse as an intermediary because I had figured out from my experience that in private hospitals nurses are seen more as facilitators and not as figures of authority to the degree of government hospital due to structural factors

and culture within private hospitals; an observation I substantiated at the stage of data analysis. I have discussed in detail the degree of micro-inequities within hospital settings which address the differences in the healthcare professionals' behaviour towards patients and their family members (Subramani, 2018). Reflecting on my experience in front of the room door in the private hospital, I wondered why I did not think about privacy in the government hospital. This incident made me reflect whether I was being insensitive to patients of the government hospital. I also reflected on how the physical structure of hospitals influence the way we understand the concept of privacy. It seemed that the concept of privacy did not matter much at the government hospital, and the physical structure of the hospital with no curtains or walls between various beds contribute to this. At the same time, in the private hospital, patients and family are given a separate space for themselves. My experiences and my reflective thoughts on those experiences made me critically question and understand my actions and look at the larger discourses on inequity within the health system. I wondered if the higher class who had greater purchasing power could enjoy the luxury of privacy within this context. My answer is in the affirmative.

These 'reflexive moments' illustrate the inter-twined relationship among personal experiences, chosen methods, field-work sensitivity, and the moral reflection and stances of the researcher within the broader context studied. The reflexive moments and analytical questions along with the data analysis of participants' perspectives and observations, based on critical CGT methodology, prompted me to turn towards certain philosophical literature which influenced the knowledge construction process and the moral and theoretical arguments on 'respect for person'. The major finding of my doctoral study showed that 'patients and family members' are not considered as 'knowledgeable/competent persons' who can engage with and be a part of clinical interactions and decision making of the treatment (Subramani, 2018). They are perceived as 'incompetents', who cannot understand the information discussed by surgeons and nurses, due to perceived circumstantial characteristics such as illiteracy, poverty, and psychological factors such as anxiety and fear. During the analysis, I found that, surgeons and nurses used this perception to justify their paternalistic practice of not engaging with patients and family members during clinical interactions, which led to their disrespecting them. This analysis led me to pursue and promote the concept of 'respect' and to focus, in particular, on the ethical argument of 'respect for persons', drawing from broader theoretical and ethical arguments (Beauchamp and Childress, 2001; Buss, 1999; Darwall, 1977, 2006; Dworkin, 1988; Entwistle and Watt, 2013; Macklin, 1999). The analysis further helped me to consider the relational ontology of the relationship between surgeons, patients and family members in the given context with regard to medical decision-making of elective surgery. Surgeons are required to discuss material information with

them in the hospital settings in the Indian context by considering them respect-worthy as them being 'person' implies 'worthiness' and through certain moral attitude.

### **Significance of practising reflexivity: demystifying moral and theoretical positions**

My understanding of reflexivity is strongly related to acknowledgements of qualitative research methodology as inherently reflexive (Smith, 1987, 1990). I have considered reflexivity as a critically conscious activity of meaning-making and constructing themes, ideas, concepts and arguments. A reflexive approach to research made me conscious of the decisions I made at different phases of my research: from the clothes I wore, the words I used, my hair style, body language, and so on to larger epistemological and methodological positions (Etherington, 2004; Poland and Pederson, 1998). Reflecting on the knowing process made me aware of the factors that influenced my research. The reflexive approach during the data collection stage (and data analysis), for instance, influenced the moral and theoretical concepts I eventually considered and employed during the study. I argue that by being reflexive during the research process, I was able to pay attention to the intertwining relationships of context, epistemology and methodology within research. Through reflexivity, I hold myself accountable and open for readers and peers to see how moral knowledge construction happens in the particular context. My decision to engage with the question of 'respect for person' and to establish it as a moral and theoretical argument in the Indian context was influenced by the epistemological, critical constructivist theoretical and methodological stances along with an inclination towards ethical universalism. Various scholars have emphasized the relevance of reflexivity in qualitative research for various reasons such as quality, rigour, validity, researcher's capacity, being ethical, etc. (Carter and Little, 2007; Coffey and Atkinson, 1996; Denzin and Lincoln, 2011; Finlay and Gough, 2008; Hall and Callery, 2001; Mauthner and Doucet, 2003; Seale, 1999). In this article, I have offered an account of how I practised reflexivity and its influence on knowledge construction. Reflexivity prompted me to be sensitive to certain concepts, be conscious and critical of the manifestations of theoretical and moral arguments. Looking back at my experiences during the field work, especially with gatekeepers, I realize how the gatekeeper-participant relationship can influence the research process. During the process of data collection, being reflective helped me, as a researcher, to be conscious of the steps I took. By reflecting as a researcher, who has some 'power' (subject to gatekeeper influence) not only over the choice of approach or method for gaining access to individuals or data but also over the process of ethically reflecting upon the choices and decisions made, the researcher is made aware of her or his epistemic powers over others and how it may influence or affect

knowledge construction. I believe that the reflections on the decisions made and their consequences during the research process help the researcher to employ an ethically justified research approach which holds the researcher accountable and asks for transparency. Though I made sure that I respected individual participants, sometimes it proved difficult in practice. For instance, at the government hospital, the very nature of the hospital's architecture made it difficult to respect the privacy of individual patients and to give them control over their space. As the patients were in the common ward, I had already entered into their space by entering the wards. However, I sought their consent before interviewing them. Practising reflexivity guided me to approach the research concept of 'informed consent' within the context, but at the same it prompted me not to be an absolute relativist or realist, given the power asymmetry between many stakeholders in the health system. The significant aspect of practising reflexivity altered the way '(moral) knowledge' is constructed. I believe that reflecting on epistemological, methodological, theoretical and moral stances made me realize the intertwining relationship of researcher experiences, knowledge and the overall research process. A reflexive approach towards qualitative research demystifies the knowledge construction process and moral positions of the study and researcher and holds the study and the researcher accountable. And I have argued that reflexivity shows the existing inter-twining relationship among personal experiences, epistemological, theoretical, moral and methodological stances and larger moral and theoretical arguments of the researcher.

## Conclusion

In this article I offer an account of practising reflexivity at different stages of the research process. I have narrated certain reflexive moments from my research journey, where personal stories, researched relationships, being sensitive to context and spaces demanded reflexive analysis. I have highlighted the significance of reflexivity within qualitative study of the bioethics concept and its influence on the epistemological and methodological stance of the researcher. I have attempted to present the underlying inter-twined relationship between theoretical and epistemological assumptions which influence knowledge construction. Through an illustration of the practice of reflexivity, I have attempted to contribute to the growing recognition of qualitative research within bioethics and its significance in demystifying the moral and epistemological claims and positions of the study and the researcher. Given the recent debates on methodological discussion within empirical-ethical research in bioethics, practising reflexivity reveals the influence of researchers' experiences and values on the research process and the moral epistemological stance which researcher endorses. I believe that in the growing field of bioethics research, the methodological discussion should not detach from epistemological

analysis. One of the fundamental challenges or epistemological anxieties in ethics debates revolves around the ethical principles or values 'taken for granted' within the studied context (Borry et al., 2004; Davies et al., 2015; De Vries and Gordijn, 2009; Ives, 2014; Ives and Dunn, 2010; Leget et al., 2009; Molewijk et al., 2004; O'Neill, 2009; Walker, 2007; Johnstone, 2015; Salloch et al., 2015). The critical CGT methodology employed in my study considers relativist epistemological stance and acknowledges the researcher's connectedness of experiences in theory constructions or moral arguments and helps critically examine the existing practices. Through an account of reflexivity I demonstrated the existing interlinking relationships between the researcher, the research questions, ethical research practice in the field, methodological positions and theoretical arguments, which serve to demystify the 'objectivity' of 'normative' conclusions of principles and theories of moral knowledge within qualitative bioethics debates. In this article, I have restricted the discussion to the initial phase of research process. Other phases of research, particularly data analysis, merit a much deeper analysis. While I examined the practice of reflexivity and its significance in understanding knowledge construction processes, further research on its interactive effects on moral knowledge, especially within moral epistemological debates, is called for, given the emergence of 'empirical turn' in bioethics research.

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### **Author biography**

Supriya Subramani recently submitted her doctoral thesis which focussed on the ethical principles and values underlying the concept of 'informed consent' in the medical judiciary and clinical practice within the Indian context. Her general research interests are in ethics, behaviour and law. In particular, she is interested in the qualitative inquiry into moral subjectivities of individuals and moral epistemological inquires within qualitative bioethics research.



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# On Becoming a Qualitative Researcher: The Value of Reflexivity

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## On Becoming a Qualitative Researcher: The Value of Reflexivity

### Abstract

Learning how to conduct qualitative research may seem daunting for those new to the task, especially given the paradigm's emphasis on complexity and emergent design. Although there are guidelines in the literature, each project is unique and ultimately the individual researcher must determine how best to proceed. Reflexivity is thus considered essential, potentially facilitating understanding of both the phenomenon under study and the research process itself. Drawing upon the contents of a reflective journal, the author provides an inside view of a first project, making connections between theory and practice. This personal narrative highlights the value of reflexivity both during and after a study, and may help to demystify the research process for those new to the field.

### Keywords

Reflexivity, Research Journal, Qualitative Methodology, and Student Researchers

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## **On Becoming a Qualitative Researcher: The Value of Reflexivity**

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*Learning how to conduct qualitative research may seem daunting for those new to the task, especially given the paradigm's emphasis on complexity and emergent design. Although there are guidelines in the literature, each project is unique and ultimately the individual researcher must determine how best to proceed. Reflexivity is thus considered essential, potentially facilitating understanding of both the phenomenon under study and the research process itself. Drawing upon the contents of a reflective journal, the author provides an inside view of a first project, making connections between theory and practice. This personal narrative highlights the value of reflexivity both during and after a study, and may help to demystify the research process for those new to the field. Key Words: Reflexivity, Research Journal, Qualitative Methodology, and Student Researchers*

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Learning to reflect on your behavior and thoughts, as well as on the phenomenon under study, creates a means for continuously becoming a better researcher. *Becoming* a better researcher captures the dynamic nature of the process. Conducting research, like teaching and other complex acts, can be improved; it cannot be mastered. (Glesne & Peshkin, 1992, p. xiii)

### **Introduction**

Given the complex nature of qualitative inquiry, it is reasonable to expect new researchers to feel some trepidation at the onset of a first study. Although there are guidelines in the literature, the paradigm's emphasis on interpretation and emergent design provides no precise formula on how to proceed. Each project is unique and ultimately it is up to the individual to determine what works best. Since the researcher is the primary "instrument" of data collection and analysis, reflexivity is deemed essential (Glesne, 1999; Merriam, 1998; Russell & Kelly, 2002; Stake, 1995). Experts contend that through reflection researchers may become aware of what allows them to see, as well as what may inhibit their seeing (Russell & Kelly). This entails careful consideration of the phenomenon under study, as well the ways a researcher's own assumptions and behavior may be impacting the inquiry. Although convincing on a theoretical level, as a new researcher I had little idea what this meant in concrete terms.

That began to change as a result of the practical experience gained during my first pilot study, which was carried out in the context of a graduate course on qualitative methodology. As part of that inquiry, I decided to put reflexivity to the test by keeping a

research journal. In a subsequent graduate course I returned to this journal, using it as a stimulus to reflect back on the original pilot study in order to deepen my understanding of the research process. This personal narrative is the result. Although many of the benefits of journaling were apparent while I was engaged in the initial inquiry, before working on the current paper I did not appreciate the extent to which writing and reflection had pushed that project forward. In addition, this second level of reflection had led to significant new insights, profoundly influencing my growth as a qualitative researcher. This research story thus sets out to highlight the value of reflexivity as a powerful learning tool both during and after a student's first research efforts. In addition, this inside view of my project may render qualitative methodology less mysterious for others new to the field. During the initial inquiry I relied upon experts for guidance, but may also have profited from hearing the voices of struggling beginners like myself. Professors working with graduate students may likewise be interested in a student perspective on the benefits and the value of reflexivity in methodology course work.

### **Method**

Richardson (2000) refers to writing as “a *method of inquiry*, a way of finding out about yourself and your topic” (p. 923). A “personal tale of what went on in the backstage of doing research” (Ellis & Bochner, 2000, p. 741), my own experience is the subject of this paper. My research journal contains a permanent record of the pilot study, and served as a memory prompt for this second level of reflection. Drawing on excerpts from the journal, I made links between the literature on methodology, decisions taken during the project, the process of reflexivity, and my evolving understanding of the complexities of qualitative research. I analyzed journal entries for what they revealed about the management of each phase of the study, the issues and tensions which arose, and the ways I dealt with these as a new researcher. A retrospective examination of my own research permitted me to make meaningful connections between theory and practice. This inquiry thus provoked a depth of learning which may not have been possible through any other methodological means. By reconsidering my pilot study in this way, I experienced the extent to which reflection is an essential mediator in the research process. Reflective writing allowed me to meaningfully construct my own sense of what it means to become a qualitative researcher.

### **Why a Research Journal?**

A number of experts (e.g., Glesne & Peshkin, 1992; Maxwell, 1996, 2005; Spradley, 1979) recommend writing short notes, or memos, to one's self during the entire research project, claiming a number of benefits. They point out that getting ideas down when they occur is actually the beginning of analysis. Writing notes to one's self permits researchers to discover things in their heads that they did not know were there (Elbow, 1995; Huff, 1999; Woods, 1999). Soon after I began journaling, the generative nature of this practice became clear.

It seems obvious now that if I was not writing down ideas and thoughts as they come to me, I would be missing a lot. What I did not expect was that the process of writing them down somehow stimulates more thought. Perhaps it simply makes me more conscious of my thoughts...Since formally starting to reflect on this project by writing memos a couple of weeks ago, I have opened the floodgates and ideas come to me throughout the day. It seems now that this study is always on my mind. (Journal entry, October 18, 2003)

As Maxwell (1996) asserts, memos can “convert thought into a form that allows examination and further manipulation” (p. 11).

In addition, audiences should have the opportunity to see how the researcher goes about the process of knowledge construction during a particular study. By engaging in ongoing dialogue with themselves through journal writing, researchers may be able to better determine what they know and how they think they came to know it. An introspective record of a researcher’s work potentially helps them to take stock of biases, feelings, and thoughts, so they can understand how these may be influencing the research. Making such information available to readers provides them with a means to better evaluate the findings. Proponents of the openness in qualitative inquiry assert a need to publicly disclose research decisions to “make analytical events open to public inspection” (Anfara, Brown, & Mangione, 2002, p. 31), for “a key part of qualitative research is how we account for ourselves, how we reveal that world of secrets” (p. 29).

While these are compelling reasons for the use of a reflective journal, little mention is made in the literature of the potential value of reflexivity from the perspective of a beginning researcher. As Glesne and Peshkin (1992) suggest, reflection is crucial as a means to continuously work on becoming a better researcher and a journal provides a focal point for this activity. Students are necessarily preoccupied with acquiring a myriad of research skills (such as interview techniques and data analysis) and may be tempted to delay the use of a reflective journal until after they become more comfortable with what might be considered the basics. However, maintaining a journal during my first study, followed by reflective writing which focused on that work, led to a more sophisticated understanding of not only reflexivity, but all aspects of research methodology.

### **My Research Purpose**

Many state the importance of choosing a suitable research topic (e.g., Denzin & Lincoln, 1998; Gallos, 1996; Glesne, 1999). It is important to figure out “which issues, uncertainties, dilemmas, or paradoxes” (Glesne & Peshkin, 1992, p. 14) are most intriguing. Fieldwork is a process that assumes a degree of wholehearted commitment (Wolcott, 1995), so topics should be chosen on the basis of what a researcher believes is most worthwhile. “Good research questions spring from [a researcher’s]...values, passions, and preoccupations” (Russell & Kelly, 2002, p. 5). I had spent 14 years educating my children outside of school and knew this was the area I wanted to explore more systematically. At the same time, journal entries testify to some of the concerns I had with this choice of topic. I made use of my journal to work through some of these



concerns, by carrying out a number of reflective exercises related to research purpose and trustworthiness, as recommended by Maxwell (1996, 2005).

Researchers are advised to carefully consider their reasons for conducting a particular study (Marshall & Rossman, 1995; Maxwell, 1996, 2005). Maxwell (1996) explains that there are personal, practical, and research purposes. Researchers first of all need to be aware of their personal reasons for carrying out a study -- their subjective motives -- for these will have important consequences for the trustworthiness of a project. If design decisions and data analyses are based on personal desires without a careful assessment of the implications of these methods and conclusions, they risk creating a flawed study. While it is neither possible nor necessary to purge one's self of personal goals and concerns, Maxwell contends that it is crucial to be aware of these concerns and how they are shaping the research, and to think about how best to deal with their consequences.

Given my own involvement in home education, the first reflective exercise I engaged in was to examine my reasons for wanting to research this topic. As a home schooling mother, I was convinced of its educational virtues. However, journaling allowed me to make connections between home education and my teaching experiences years earlier.

As a teacher I believed in the uniqueness of each child and felt education should be approached with this in mind. However, from my own teaching experiences I know that this is not so easy in a school setting...How might schools better meet the needs of individual students? (Journal entry, September 30, 2003)

Through the writing process, I was able to excavate memories of my own classroom practice, in which I had experienced the difficulties of trying to meet the needs of all learners. On the other hand, I knew that individual needs are more easily met in a home school setting, where learning tends to be highly individualized. I explored these ideas in my journal.

I honestly believe that there is much to be learned from what home schoolers do...My study might teach us something about learning, itself...Is there anything present in the learning situation in a home school that can tell us more about how children learn/about the learning process itself? (Journal entry, September 30, 2003)

By articulating my thoughts on paper, I soon identified what it was about home education that might be worth studying. I wondered what these unique learners might teach us about individualized learning processes. My literature review demonstrated that the learning process in home school environments had not been studied in a systematic, rigorous manner. There was definitely a gap in knowledge regarding how children learn outside of formal educational contexts. Writing and reflection proved generative, for I was able to clarify not only my research purpose (a desire to gain insight into the learning process in a home setting), but also why I thought this was worth pursuing.

Eisner (1991) observes that “few people seem to be happy with the overall state of our schools, but fewer still seem to know just what to do about them” (p. 10). I wondered what might be understood about learning based on home schooling practices. Can what home educators do somehow be applied to the larger system? Here was the practical purpose for my research. During the journal writing process, questions emerged which forced me to think more deeply about what I wanted to do with this study and why.

Why conduct a study when I think I know what I am likely to find? I know it, other home schoolers may know it, but perhaps only through rigorous, scholarly research will others come to know and possibly accept it/learn from it. (Journal entry, October 10, 2003)

Reflective exercises revealed my desire to provide school officials and policy makers with more information, so they might better understand the nature of home school learning, for there remains a great deal of skepticism in these quarters. By identifying personal, practical, and research purposes through reflective writing I was confident I had chosen a worthwhile topic of inquiry.

### **Designing the Study**

In designing a study, qualitative researchers face at least three challenges (Marshall & Rossman, 1995). The first is to develop a conceptual framework that is “thorough, concise, and elegant” (p. 5). The second is in planning a design that is “systematic and manageable yet flexible” (p. 5). The third challenge is being able to integrate these into a “coherent document that convinces the proposal reader...that the study should be done, can be done, and will be done” (p. 6). Research design requires much thought and reflection, and journaling would definitely have facilitated this process. However, the initial literature review and a preliminary research proposal for my pilot study were completed in an earlier methodology course, and I had not yet initiated my reflective writing practice. When the time came to carry out this pilot project I needed to update the literature review, and I summarized research articles in my journal, highlighting the most important points. I was amazed to see how attitudes towards home education were shifting in a more positive direction in such a short time. The importance of remaining current became apparent.

### **Participant Issues**

With the research design in place, it was time to find a home schooling family willing to take part in the study. My participants were chosen because I had easy access to them, and I believed they could provide me with a good “opportunity to learn” (Stake, 2000, p. 446) about the phenomenon of interest. All four members of this family (two parents, John and Anita; a 13-year-old boy, Jeff; and a 15-year-old girl, Susan) were very articulate and provided extensive data related to learning in a home school setting. However, even though my participants were exemplary, rereading journal entries related to participant issues revealed some of the difficulties which arise in qualitative inquiry. Many of the entries recall the uncertainty I often felt. Was I approaching an issue in the

*right* way? What should be the principles which guide my research? Conducting research, which looks so intensely at the personal lives of others, is not for the faint of heart, and at times I wondered whether I was up to the challenge. Journal entries indicate my growing awareness of some of the potential risks inherent in qualitative research, and shed light on some of the specific concerns I had to negotiate over the course of the study. For example, I worried about what I might do with interview data that portrayed the participants in an unflattering manner.

Do I have the courage to be totally honest no matter what I might find? I know my participants and would never want to hurt them. However, it wouldn't matter who the participants were, I would not wish to paint anyone in a negative light. This issue has led me to question whether I am cut out to be a qualitative researcher. Why would anyone participate in a research project if they thought I might write something negative about them anyways? (Journal entry, November 1, 2003)

A week later similar concerns resurfaced, as the following comment illustrates.

I don't feel its right to quote someone in a manner they would find embarrassing... (Journal entry, November 6, 2003)

I often felt torn between considering the needs and best interests of my participants and reporting findings according to my own interpretations.

I thought a great deal about the question of whose interests would be served by my research (Wolcott, 1995). I wanted to provide the educational establishment with more information on home-based learning and knew that I also had much to gain personally, but how would my participants benefit from their involvement in my project? When I approached John and Anita with my research idea, they readily agreed to participate. They thought that being involved in a research study would be a good learning experience for their children. When I spoke to Jeff and Susan, they were equally enthusiastic. A couple of weeks into the project, I wrote,

John asked if they could have the interview tapes when the study was over. I agreed ... A small benefit to them for participating in this study. (Journal entry, October 23, 2003)

I remember feeling relieved when John asked for copies of the tapes, as this was one tangible benefit I could offer. The older of the two adolescent participants also had a request. This one, however, was much more complicated, as this excerpt suggests.

Susan asked me about the possibility of including a copy of the study in her portfolio [for university entrance]...I certainly don't have a problem with this. Isn't research supposed to benefit our participants in some way? But I worry about how what I write in my report might either help or hinder her. Will knowing that this is ultimately one of the ways in which this study will be used influence what I decide to present or not present?

What if I write something that might work against Susan's interests?  
(Journal entry, October 18, 2003)

This prompted me to seriously consider my responsibilities to those who agreed to be part of my study. A researcher must be cognizant of the state of his/her ongoing relationships with participants and how this might be influencing the outcomes of a study. The questions raised in this particular journal excerpt reflected an uneasy awareness of the power I actually had as a researcher. Looking back, I realize that no matter what students may learn from course work or the qualitative research literature, they cannot appreciate the gravity of such issues until they begin working with actual participants.

Other journal entries also indicated an ongoing concern with maintaining rapport and causing no harm. This preoccupation was intensified by the fact that my participants were from my own community, but I suspect that researchers agonize over these matters in most studies. The initial excitement of being involved in my first inquiry gradually gave way to a heightened realization of the many ethical issues surrounding the practice of qualitative research. A number of excerpts highlighted this growing sensitivity. For example, I wrote,

How do you deal with something your participants would not see as flattering, especially when you know them personally? (Journal entry, October 7, 2003)

This particular entry marked an increasing uneasiness around the politics of interpretation and representation, although at the time I would not have been able to articulate the source of my discomfort in these terms. One month later, the same issues were tormenting me.

What will I do if my participants and I don't agree on some aspect of the "findings"?...You certainly can't misrepresent your participants. At the same time, you are more familiar with the literature, and as a researcher have your own expertise/perspectives. It is my research. These issues are complex, and frankly, more than a little scary...It seems that qualitative researchers are constantly engaged in a fine balancing act on a number of levels. (Journal entry, November 7, 2003)

What strikes me most about this excerpt is how I took for granted that there was a single reality out there that one could represent accurately. By reviewing my reflective journal retrospectively, I realize now that over the course of this project I frequently questioned my epistemological and ontological assumptions. Although I assumed that the participants and I were co-creating knowledge, it seemed a delicate balance. What role should participants play in the interpretive process, if any? How strong should my voice be? I planned to do participant checks after analysis. However, some (e.g., Morse, Barret, Mayan, Olson, & Spiers, 2002) actually consider such checks a *threat* to validity, arguing that verification must take place during the research process so that it can shape the process, not after analysis. I continue to grapple with these issues. Stake (2000) suggests that "what is necessary for an understanding of the case will be decided by the

researcher” (p. 441), but given recent paradigm shifts, not all would agree. As a student, it is a challenge to keep abreast of continuous transformations in the field.

Another ethical question which arose was the degree to which a researcher may intrude in the lives of participants.

I don't want to impose on this family. Even though I know them, they are very busy...Given their busy, irregular schedules and my own, it is not as easy to arrange to meet with them as I thought it might be. Fitting research into busy lives is no easy matter. (Journal entry, October 21, 2003)

As this entry illustrates, after four interviews I felt I may have been asking too much of my participants, but at the same time wondered if I had enough data to shed light on my research questions. Wolcott (1994) emphasizes the importance of extended time in the field, but few researchers have unlimited access to participants. This underscores the importance of a well thought-out research design and the need for constant monitoring of a project. Writing this narrative made me aware of how journaling helped me to keep track of what was happening in my study on a number of levels, so that timely adjustments could be made if and when necessary. This use of the journal helped me to manage the project.

## Data Collection

### Data Management

Many observe that the qualitative researcher must “expect to be overwhelmed with the sheer volume” (Glesne & Peshkin, 1992, p. 131) of data that accumulate. I soon discovered the truth in this statement, noting in my journal that “papers [were] piling up . . . even after just one interview” (Journal entry, October 24, 2003). Forewarned, I made a special effort to manage the data. I decided to include field notes in my research journal because I reasoned it would “be easier to see connections if everything [was] in one place” (Journal entry, October 22, 2003). The journal was housed in a large binder, so I was able to add, remove, or rearrange documents as I thought necessary. I found that “the physical act of maintaining the binder gave me the feeling that I was in control of the material I had accumulated” (Journal entry, October 22, 2003). Having field notes and reflective memos in this one location did not completely eliminate the sense of being overwhelmed, but it did help to keep it in check.

### Observations

I had planned to collect data through observations, and found some useful tips in Spradley's (1980) classic text, *Participant Observation*. However, it soon became evident that carrying out observations would not be as straight forward as I had envisioned. After the very first conversation with one of my participants, I wrote,

Susan and I discussed a possible observation time, where I could come over and just sit around and see what she normally does. There was silence on the other end of the phone when I proposed this...She thought that if I were present, she would not “do” what she “normally does”... So, what I thought would be clear and simple – an observation at the home of a family who knows me – is not going to be that at all!! I am worried now that such an observation may not even be possible! (Journal entry, October 21, 2003)

My young participant’s insightful comment, which I stressed over in my journal, prompted a return to the literature on participant observation and led me to rethink my plans for data collection. Some experts suggest that “it is now possible to question whether observational objectivity is either desirable or feasible as a goal” (Angrosino & Mays de Perez, 2000, p. 674). The qualitative researcher is situated in any given study and should be aware of the fact that he/she is part of the scene being observed, and as such has an influence on it. This perspective emphasizes observation “as a context for interaction among those involved in the research collaboration” (p. 676). I finally decided not to use observation and also gained an appreciation of how participants may unexpectedly influence the course of an inquiry. Susan’s questioning of my proposed observations also highlights the power relationships that exist in any research situation. Rereading this entry long after the completion of the project provided me with insights into my personal approach to the participant-researcher relationship.

## **Interviews**

As the journal entry below illustrates, my assumptions about the interview process were also disrupted after entering the field. During the first interview session, at the home of my participants, I had to leave the room for a few minutes and suggested that they continue to talk into the tape recorder about their reasons for opting out of institutionalized schooling. They had been engaged in lively conversation up until this point, and I took for granted that they would continue on without me. However, “when I left the room they decided they could not tell their stories without me being physically present” (Journal entry, October 27, 2003). There was no doubt that my presence was influencing the nature of the knowledge generated in this interview situation. Even though I had read that, “[i]ncreasingly qualitative researchers are realizing that interviews are not neutral tools of data gathering but active interactions between two or more people leading to negotiated, contextually based results” (Fontana & Frey, 2000, p. 646), I was still operating under old assumptions.

By returning to the research scene through writing this reflective paper, I have been able to chart some of my own learning as it related to interviewing. My original ideas were somewhat unsettled when I first encountered the interview literature. However, it was not until I was faced with a concrete interview situation that the theory I had read about became more explicit. I was consequently better able to comprehend how knowledge is in fact negotiated and dependent upon the interview context. The written

record of this incident in my journal permitted me to make these links, which otherwise may have been lost to me in the busyness of the actual project.

Based on my reading (e.g., Gubrium & Holstein, 2002; Kvale, 1996; Merriam, 1998; Patton, 2002; Seidman, 1998; Spradley, 1979), I decided interviews would be informal and conversational; exploratory, flexible, with open-ended questions. I followed Seidman's recommendation to conduct a series of three separate interviews. The first establishes the context of the participants' experience. "People's behavior becomes meaningful and understandable when placed in the context of their lives and the lives of those around them. Without context, there is little possibility of exploring the meaning of an experience" (p. 11). All four participants were present at the first interview, and the session was lively and informative. When I returned home from the session I wrote down my impressions.

I began the first interview by trying to contextualize this family's experience. However, the interview took on a life of its own and I need to look at whether what I set out to accomplish was actually realized. I feel I may not have said enough myself, may not have directed the conversation enough...[But] in the group setting I found that they got one another talking and there seemed little need for me to intervene. If I am interested in their stories, is it appropriate to interrupt? (Journal entry, October 24, 2003)

I often conversed with myself in the journal in this way. I summarized what I had been trying to achieve and then assessed what actually happened, which frequently led to questioning. In the above excerpt, for example, I was unsure of how directive I should be in an interview. In spite of what I had read, I obviously still understood the interview to be an uncomplicated situation in which the researcher asked questions and participants provided answers. Throughout the project I was caught up in such struggles, between my own unexamined assumptions and recent theory. While journaling, in itself, did not necessarily provide instant answers, by focusing on how things had gone in the research situation and relating it to the methodology literature, I was better situated to make adjustments before moving on to the next stage.

Following Seidman (1998), the second interview focused on concrete details of the participants' present experiences. In subsequent interviews I asked them to reflect on the meaning of these experiences. I found that each interview provided a foundation of detail that helped to illuminate the next, and began to appreciate first hand why interpretation must necessarily be ongoing. "There isn't much sense to go out and get more if you haven't digested what you took in last time" (Wolcott, 1995, p. 99). However, I also discovered how difficult this was to achieve. Seidman recommends that interviews be 3 days to a week apart. This allows participants "to mull over the preceding interview but not enough time to lose the connection between the interviews" (p. 33), and also puts pressure on the researcher to find time for reflection and interpretation between sessions. Interview data were piling up as I struggled to complete transcribing each interview in preparation for subsequent interviews. Although I did manage to transcribe and at least briefly think about every interview before going on to the next, I felt rushed, and worried about how this would affect my interpretations.

About half way through this period, I panicked. Did I have the *right* data? In my journal I reiterated what Kvale (1996) has to say on this matter.

Kvale cautions us to be careful about the nature of the data we collect...We need to spend prolonged time in the field, which produces piles of data ... [but] quantity alone is not enough. The content of that data is also vital. To have the “right” content...we must know where we are going. At the same time, qualitative studies are by definition “emergent,” so I need to be open and sensitive to where my participants and my own insights may take me. There seems to be a fine line between meandering off in all directions and trying to get data needed to answer our research questions. (Journal entry, October 30, 2003)

By summarizing Kvale’s advice in my own words, I was able to gain some perspective on where I was at in the study and take measures to evaluate the quality of my data. I reviewed my research questions and carefully assessed the nature of the data I had collected so far. Thus, I was able to go into the final interviews knowing what was still needed in order to address my questions. Looking back on the data collection period in this way helped me to gain a sense of how my reflective interactions, with both the data and the literature, directly influenced the decision-making process during the study. Writing about what was going on in my project helped me to clarify the particularities of a given situation, which was an important step in identifying possible ways to proceed. Looking back on my use of the journal, it is obvious that for me writing does facilitate thought. It also provided me with a sense of emotional security. A student grapples with not only the “how to” of research, but also with the complexity of the research process itself, and the journal provided a place to pull everything together in a concrete form that I could draw upon to guide the project.

### **The Emergent Nature of Qualitative Inquiry**

My experiences with data collection have shown how I depended upon “purposeful reading” (Wolcott, 1990) throughout the study for information on research methodology. The brief notes I took on many of these readings were included in my journal, adding another dimension to the reflective process. I explained,

This journal provides me with a means to not only note what I think is of significance in my readings, but I can get down on paper my thoughts and reactions to this information... (It) is a place to interact with what I am reading, which promotes my own learning and understanding. (Journal entry, October 21, 2003)

The journal naturally became a place to bring together participant data, notes on the methodology literature, my thoughts and ideas, and reading responses. As the decision to modify my plans for data collection illustrates, using the journal in this manner proved very productive. Struggles around data collection also bore out what I had read in the



literature, namely that qualitative inquiry requires flexibility and an openness to whatever comes up in the field.

The evolution of my project's title also indicated an increasing appreciation of the ways in which qualitative work is emergent. A title captures the essence of a study, and thinking about it helps a researcher to conceptualize a project. Whenever I had an idea for a title I wrote it down in the journal. Inspiration came from personal experience, the literature on home education, participant data, and insights gained in the field. Each title change reflected a more refined understanding of some aspect of research. The initial title, *Exploring the Learning Process in a Home School: A Case Study*, implied that it would be my perspectives as researcher which would be privileged. At that point, I took for granted that I would be looking for some objective "truth" rather than co-creating knowledge with my participants. I was unfamiliar with the notion that qualitative research represents "a new way of thinking about the nature of knowledge and how it can be created" (Eisner, 1991, p. 227), and that researchers are part of the meaning-making process.

It took nine title modifications before I finally arrived at, *A Different Kind of Education: One Family's Perceptions of Learning Outside of School*. I had read that a case study presents multiple perspectives and realities (Stake, 1995), and of the importance of representing the participants on their own terms through the meanings they attach to their own words and actions (Glesne, 1999; Maxwell, 1996; Merriam, 1988; Patton, 2002). In my journal, I noted that my reason for dropping the term *home school* from my original title was that my "participants tell me that this does not describe what they do" (October 19, 2003). I realized that if it was their perspectives I was trying to capture then I needed to use their terminology. In looking back at these title changes and the reasons why I made them, I located specific moments in my learning.

### **Issues of Trustworthiness**

One of the biggest concerns that I have is the issue of trustworthiness. I'm just not certain how I can deal with my subjectivity in a way that will lead to what will be considered by others to be a trustworthy project. (Journal entry, October 25, 2003)

Constas (1992) writes that "questions concerning the credibility and status of qualitative inquiry are related to the privatization of qualitative analysis" (p. 253). He argues that researchers should make all aspects of their analysis open to public inspection. The idea of researching a topic I was close to myself, and having acquaintances as research participants, was appealing because I thought we had much to teach others about the learning process. However, as journal excerpts demonstrate, I also wondered if such a study would be of interest to anyone. Would it be taken seriously?

Is my study just going to end up being a self-fulfilling prophecy? By this I mean, I know what I will/want to find, so I'll just go in and find it, and won't that be easy! Even my participant check could be called into question...I write wonderful things about them, they agree, we're all happy...lousy research? (Journal entry, October 15, 2003)

Glesne and Peshkin (1992) caution researchers to be wary of the desire to justify their own experience. It is important to be interested in the topic, but a researcher cannot allow emotional attachment to “preclude the open, exploratory learner’s attitude that is necessary for good data collection and analysis” (p. 14). Once data collection began, I found that although this family’s approach to home education was similar to my own, it was also quite unique. I did find many of the things I had expected, but also discovered a great deal about their practice as well as my own. However, the question of trustworthiness continued to trouble me, and I repeatedly returned to my journal and the literature in search of reassurance.

After reading an article on verification strategies for establishing reliability and validity (Morse et al., 2002), I made these comments in my journal.

This article makes a few more things clearer to me re: trustworthiness...I was still somewhat uncertain about how reflexivity would add to the trustworthiness of my study. I now see that it has helped me to clarify my thinking, values, purposes, and beliefs. I can now be up front about this so others know where I’m coming from. I cannot shake off my biases, but I can make them known. (Journal entry, November 7, 2003)

Reason (as cited in Maxwell, 1996) argues in favor of *critical subjectivity*, which he describes as,

... a quality of awareness in which we do not suppress our primary experience; nor do we allow ourselves to be swept away and overwhelmed by it; rather we raise it to consciousness and use it as part of the inquiry process. (p.12)

Through reading and reflective writing I gradually understood how my personal experiences could be an asset rather than a liability. The key was to “be open to recognizing how our own position both privileges and limits us” (Russell & Kelly, 2002, p. 10). Eisner (1991) describes *connoisseurship*, the art of appreciation, as “the ability to make fine-grained discriminations among complex and subtle qualities” (p. 63). I had insights into learning in a home school setting that others may not have. For example, many families do not follow a formal curriculum. They simply find that learning proceeds differently outside an institution. Someone unfamiliar with home education might not be sensitive to the forms that learning takes in an informal context, and may thus miss a great deal. As Glesne and Peshkin (1992) suggest, “subjectivity is something to capitalize on rather than to exorcize” (p. 104).

At the same time, Stake (2000) points out that a “researcher’s knowledge of the case faces hazardous passage from writing to reading” and researchers must seek “ways of safeguarding the trip” (p. 442). I therefore aspired to what Wolcott (1990) refers to as “correctness or credibility” (p. 126) and felt comfort in his assertion that “readers will not be offended if you do not claim to know everything” (p. 46). I tried to ensure that data supported interpretations, and strove towards “thick description” (Geertz as cited in Stake, 2000). Letting participants speak for themselves was a way to *show* readers what I

had found. By triangulating data (Creswell, 1998; Merriam, 1998; Patton, 2002; Stake, 1995, 2000; Wolcott, 1994), I attempted to provide “a confluence of evidence that breeds credibility” (Eisner, 1991, p. 110). Through interviewing the four members of a single family, it was possible to compare their descriptions of the learning process. I noted in my journal, “that the same stories are being repeated and elaborated on by different participants” (Journal entry, November 7, 2003). Document analysis also allowed me to verify some aspects of the interview accounts. For example, in one interview my participants described how they had become interested in whales and eels while on vacation. Both Susan and Jeff followed up on these interests by writing articles for their field club’s annual publication. I used these articles to contextualize information acquired during interviews. Along with interview transcripts and journal entries, the articles also became part of an audit trail.

However, aware that new models for trustworthiness exist, I will think this through carefully before undertaking another study. Richardson (2000), for example, proposes an alternative. She argues that triangulation assumes,

...that there is a “fixed point” or “object” that can be triangulated. But in postmodernistic mixed-genre texts, we do not triangulate; we *crystallize*. We recognize that there are far more than “three sides” from which to approach the world... [With the crystal metaphor] what we see depends upon our angle of repose...Paradoxically, we know more and doubt what we know. Ingeniously, we know there is always more to know. (p. 934)

I find this compelling, and it may be the standard for trustworthiness in my next study. While writing this paper, I frequently thought about how I might approach future research.

### **Data Analysis**

Data analysis involves organizing what has been seen, heard, and read so that sense can be made of what is learned (Glesne & Peshkin, 1992). Since analysis takes place throughout the entire research process, a study is shaped and reshaped as a study proceeds, and data is gradually transformed into findings. Since “each qualitative study is unique, the analytical approach used will be unique” (Miles & Huberman, 1994, p. 433). In addition, each researcher has his/her own preferences, strengths, and weaknesses, and must determine what works best. “Direction can and will be offered, but the final destination remains unique for each inquirer, known only when – and if – arrived at” (Patton, 2002, p. 432). When I reached this final stage of analysis, and had all of my notes and data in front of me, I was at a complete loss. Putting it all aside, I reread Wolcott (1990, 1994), Merriam (1998), and Stake (1995) seeking clues on case study analysis. I took brief notes on these readings in my journal, but did not turn to writing as a way to explore possible reasons as to why I was having difficulty. Nor did I reflect on the stress I was experiencing and how that might be affecting my ability to move forward.

During this period of analysis, journal entries most often consisted of experimental charts, diagrams, idea maps, and data displays rather than narrative. Researchers are advised to “display data” (e.g., Creswell, 1998; Merriam, 1988, 1998;

Miles & Huberman, 1994; Wolcott, 1994), to provide evidence for claims in a format readers can easily access. “The creation and use of displays is not separate from analysis, it is a *part* of analysis” (Miles & Huberman, p. 12). One knows what one displays. This was an efficient way to pull out and organize themes from the mass of words in front of me, so I could begin to formulate arguments. However, as I sat hour after frustrating hour with the data deciding what stories to tell, my confidence was at an all-time low. Rereading the literature was of some assistance, but somehow no one captured the essence of what I was going through. At the same time, I was so focused on the need to do something with the data that I did not consider journaling as a means to think things through, on both a personal and a research level. That was a mistake. In retrospect, this was perhaps the time I needed it most. This is not to downplay the utility of the charts and data displays, only to suggest that given what I now know about the enormous value of reflexivity, I would make much more effort to write a daily commentary, no matter how pressed for time. However, much earlier in the study I had already observed that,

... one of the challenges of learning to do this kind of research is that we are trying to do so many things simultaneously (i.e., data collection, analysis, transcription, writing, and learning how to do research – not to mention the rest of our lives!). (Journal entry, October 28, 2003)

The iterative nature of qualitative inquiry adds to the complexity of the task (Holliday, 2002).

As the study progressed, and there was more material to cope with, journaling became a lesser priority. Journal entries such as this attest to the reality that it was extremely difficult to keep up with everything qualitative research requires, especially given my beginner status.

I ended up rereading my transcripts over and over again in an effort to identify themes, scribbling in the margins when I thought I had identified something of potential importance. After preliminary coding, I decided to organize significant quotations onto my computer thematically. I labeled nine tentative categories, and then cut and pasted quotations into each one, ending up with over 25 pages. Once this was complete, I printed a hard copy. Cutting and pasting quotations into categories was very time consuming, but it paid off in the long run by offering visual evidence of the dominant themes. We are led to believe that themes simply “emerge from the data,” but looking back at my journal I discovered that most of the categories had been identified before this time, and what I was extracting from the transcripts either confirmed or disconfirmed them. These categories came from my expectations of what I thought I might find even before I started collecting data, from ideas present in the literature on home education, as well as from insights gained during the research process. Constan (1992) argues that researchers should describe their methods of analysis and identify the origin of categories. He points out that “although the general qualities associated with analysis are often alluded to, the specific procedures used to organize and interpret data are not always discussed” (p. 254). Researchers are expected to reflect on how they come to know what they know, and the chronicle of one’s thinking contained in a research journal potentially facilitates such awareness.

## Writing the Narrative

Writing forces the investigator into a new and more intensive kind of analysis (Spradley, 1980). This is the case even though it is not a discrete step in the qualitative research process, but something done throughout an inquiry. The practical experience I was gaining during the pilot study made some of the reasons for this clear, as the following excerpt demonstrates.

I am finding that the more time that passes between the actual interview and the writing and the analysis, the less vivid my memory becomes . . . My ability to provide rich description diminishes. (Journal entry, October 27, 2003)

However, a number of journal entries indicate that time was always a constraint.

No more time to work on this. It's not much of an analysis but I just don't have time to do more... A limitation, for sure... (Journal entry, October 23, 2003)

In a case study, the researcher makes a detailed description of the case and its setting (Creswell, 1998; Merriam, 1998; Stake, 1995), for description is the "foundation upon which qualitative data is built" (Wolcott, 1990, p. 27). Researchers become storytellers, inviting the reader to see through their eyes what they have seen, and then offering an interpretation (Wolcott, 1990). As a beginning researcher, I was uncertain about whether I had an appropriate level of detail to make my case comprehensible. This may have been less of an issue if I had done more writing during data collection when details were fresh in my mind. Carrying out a qualitative inquiry demands a major commitment of time and energy, and journal entries serve as a reminder that I sometimes had to cut corners.

## Personal Issues

Patton (2002) warns that qualitative research is "time consuming, intimate, and intense" (p. 35). The research described in this paper took place over a period of three months and completely took over my life, as this entry illustrates.

I'm exhausted but feel compelled to find out more. My eyes are feeling strained in a way they never have before, from the computer screen, reading, and lack of sleep. They are actually going out of focus and I need to go in and have them examined, but don't feel I have the time right now!... I have been neglecting my family, not to mention my own health. Have not been exercising, have gained weight. I'm not eating properly... am frustrated with my husband because he is too busy to take a week or two off from work to give me extra time to work on this. This thing has taken over my life. I'm unbalanced... (Journal entry, November 1, 2003)

Glesne and Peshkin (1992) confirm that “[e]xploring demands near total absorption” and “qualitative researchers find their lives consumed by their work as they seek understanding and connections” (p. 173). At times, I felt guilty about taking so much time for my project.

I love doing this work, which is why I become so involved in it. I am not sure how to maintain a balance...I want to do a PhD but am concerned about the cost to my family. I know it's good for me, but is it best for them? (Journal entry, November 7, 2003)

In spite of such uncertainties and tensions, upon completion of my case study I knew I did want to be a qualitative researcher. I concur with Wolcott (1995) who asserts that the rewards make it worth the effort. Reflecting on my first research effort strengthened my conviction, for I gained confidence in my ability to cope with the demands this type of research requires.

### **Some Lessons Learned**

Although I learned a great deal about qualitative inquiry and reflexivity while engaged in my original pilot study, writing this narrative consolidated and extended that learning. If I had not kept a journal much would have been lost, both during and now after the project. Having access to journal entries permitted me to consider my research holistically. This secondary level of reflection led to an increased recognition of the central role the journal played in the initial study. Through using writing as a method of inquiry I was able to make links between how I carried out my study, reflective journal entries, and the literature on qualitative methodology. This process enabled me to connect theory and practice, thereby gaining new insights into the complexity of qualitative inquiry and what it means to be a qualitative researcher. My own fledgling practice thus served as the foundation for what turned out to be a very personal and powerful learning experience. Looking back on my struggles at each stage of my study led to a deeper understanding of the nature of the qualitative research process, and a fuller appreciation of the vital role of reflexivity both in accomplishing a project, and in my ongoing development as a researcher. Perhaps most significantly, writing this account has altered my sense of identity (Richardson, 2000). Revisiting my study has strengthened my confidence in my ability to negotiate the complex process of qualitative inquiry, and I now *see myself as a researcher*. The multiple layers of reflection drawn upon in writing and revising this paper have made me more cognizant of how far I have come, and have taken me further along the path to becoming a qualitative researcher. At the same time, I know there can be no final destination, for each time I return to the original journal entries and my reflections on them, something new emerges. As I discover more about theory, the topic of study, the research process, and myself, my perspective shifts. Becoming a qualitative researcher is, indeed, a never-ending process.

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# Reflexivity (social theory)

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In epistemology, and more specifically, the sociology of knowledge, **reflexivity** refers to circular relationships between cause and effect, especially as embedded in human belief structures. A reflexive relationship is bidirectional with both the cause and the effect affecting one another in a relationship in which neither can be assigned as causes or effects.

Within sociology more broadly—the field of origin—**reflexivity** means an act of self-reference where examination or action "bends back on", refers to, and affects the entity instigating the action or examination. It commonly refers to the capacity of an agent to recognize forces of socialization and alter their place in the social structure. A low level of reflexivity would result in an individual shaped largely by their environment (or "society"). A high level of social reflexivity would be defined by an individual shaping *their own* norms, tastes, politics, desires, and so on. This is similar to the notion of autonomy. (See also structure and agency and social mobility.)

Within economics, **reflexivity** refers to the self-reinforcing effect of market sentiment, whereby rising prices attract buyers whose actions drive prices higher still until the process becomes unsustainable. This is an instance of a positive feedback loop. The same process can operate in reverse leading to a catastrophic collapse in prices.

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## Overview

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In social theory, *reflexivity* may occur when theories in a discipline should apply equally to the discipline itself; for example, in the case that the theories of knowledge construction in the field of sociology of scientific knowledge should apply equally to knowledge construction by sociology of scientific knowledge practitioners, or when the subject matter of a discipline should apply equally to the individual practitioners of that discipline (e.g., when psychological theory should explain the psychological processes of psychologists). More broadly, reflexivity is considered to occur when the observations of observers in the social system affect the very situations they are observing, or when theory being formulated is disseminated to and affects the behaviour of the individuals or systems the theory is meant to be objectively modelling. Thus, for example, an anthropologist living in an isolated village may affect the village and the behaviour of its citizens under study. The observations are not independent of the participation of the observer.

Reflexivity is, therefore, a methodological issue in the social sciences analogous to the observer effect. Within that part of recent sociology of science that has been called the strong programme, reflexivity is suggested as a methodological norm or principle, meaning that a full theoretical account of the social construction of, say, scientific, religious or ethical knowledge systems, should itself be explainable by the same principles and methods as used for accounting for these other knowledge systems. This points to a general feature of naturalised epistemologies, that such theories of knowledge allow for specific fields of research to elucidate other fields as part of an overall self-reflective process: Any particular field of research occupied with aspects of knowledge processes in general (e.g., history of science, cognitive science, sociology of science, psychology of perception, semiotics, logic, neuroscience) may reflexively study other such fields yielding to an overall improved reflection on the conditions for creating knowledge.

Reflexivity includes both a subjective process of self-consciousness inquiry and the study of social behavior with reference to theories about social relationships.

## History

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The principle of reflexivity was perhaps first enunciated by the sociologists William I. Thomas and Dorothy Swaine Thomas, in their book *The Child in America*, 1928 "If men define situations as real, they are real in their consequences"<sup>[1]</sup> The theory was later termed the "Thomas theorem".

Sociologist Robert K. Merton (1948, 1949) built on the Thomas principle to define the notion of a self-fulfilling prophecy: that once a prediction or prophecy is made, actors may accommodate their behaviours and actions so that a statement that would have been false becomes true or, conversely, a statement that would have been true becomes false - as a consequence of the prediction or prophecy being made. The prophecy has a constitutive impact on the outcome or result, changing the outcome from what would otherwise have happened.

Reflexivity was taken up as an issue in science in general by Karl Popper (1957), who in his book in *The Poverty of Historicism* highlighted the influence of a prediction upon the event predicted, calling this the 'Oedipus effect' in reference to the Greek tale in which the sequence of events fulfilling the Oracle's prophecy is greatly influenced by the prophecy itself. Popper initially considered such self-filling prophecy a distinguishing feature of social science, but later came to see that in the natural sciences, particularly biology and even molecular biology, something equivalent to expectation comes into play and can act to bring about that which has been expected.<sup>[2]</sup> It was also taken up by Ernest Nagel (1961). Reflexivity presents a problem for science because if a prediction can lead to changes in the system that the prediction is made in relation to, it becomes difficult to assess scientific hypotheses by comparing the predictions they entail with the events that actually occur. The problem is even more difficult in the social sciences.

Reflexivity has been taken up as the issue of "reflexive prediction" in economic science by Grunberg and Modigliani (1954) and Herbert A. Simon (1954), has been debated as a major issue in relation to the Lucas Critique, and has been raised as a methodological issue in economic science arising from the issue of reflexivity in the sociology of scientific knowledge (SSK) literature.

Reflexivity has emerged as both an issue and a solution in modern approaches to the problem of structure and agency, for example in the work of Anthony Giddens in his structuration theory and Pierre Bourdieu in his genetic structuralism.

Giddens, for example, noted that constitutive reflexivity is possible in any social system, and that this presents a distinct methodological problem for the social sciences. Giddens accentuated this theme with his notion of "reflexive modernity" – the argument that, over time, society is becoming increasingly more self-aware, reflective, and hence reflexive.

Bourdieu argued that the social scientist is inherently laden with biases, and only by becoming reflexively aware of those biases can the social scientists free themselves from them and aspire to the practice of an objective science. For Bourdieu, therefore, reflexivity is part of the solution, not the problem.

Michel Foucault's *The Order of Things* can be said to touch on the issue of Reflexivity. Foucault examines the history of Western thought since the Renaissance and argues that each historical epoch (he identifies 3, while proposing a 4th) has an episteme, or "a historical *a priori*", that structures and organizes knowledge. Foucault argues that the concept of man emerged in the early 19th century, what he calls the "Age of Man", with the philosophy of Immanuel Kant. He finishes the book by posing the problem of the age of man and our pursuit of knowledge- where "man is both knowing subject and the object of his own study"; thus, Foucault argues that the social sciences, far from being objective, produce truth in their own mutually exclusive discourses.

## **In economics**

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Economic philosopher George Soros, influenced by ideas put forward by his tutor, Karl Popper (1957),<sup>[3]</sup> has been an active promoter of the relevance of reflexivity to economics, first propounding it publicly in his 1987 book *The Alchemy of Finance*.<sup>[4]</sup> He regards his insights into market behavior from applying the principle as a major factor in the success of his financial career.

Reflexivity is inconsistent with general equilibrium theory, which stipulates that markets move towards equilibrium and that non-equilibrium fluctuations are merely random noise that will soon be corrected. In equilibrium theory, prices in the long run at equilibrium reflect the underlying economic fundamentals, which are unaffected by prices. Reflexivity asserts that prices do in fact influence the fundamentals and that these newly influenced set of fundamentals then proceed to change expectations, thus influencing prices; the process continues in a self-reinforcing pattern. Because the pattern is self-reinforcing, markets tend towards disequilibrium. Sooner or later they reach a point where the sentiment is reversed and negative expectations become self-reinforcing in the downward direction, thereby explaining the familiar pattern of boom and bust cycles <sup>[5]</sup> An example Soros cites is the procyclical nature of lending, that is, the willingness of banks to ease lending standards for real estate loans when prices are rising, then raising standards when real estate prices are falling, reinforcing the boom and bust cycle. He further suggests that property price inflation is essentially a reflexive phenomenon: house prices are influenced by the sums that banks are prepared to advance for their purchase, and these sums are determined by the banks' estimation of the prices that the property would command.

Soros has often claimed that his grasp of the principle of reflexivity is what has given him his "edge" and that it is the major factor contributing to his successes as a trader. For several decades there was little sign of the principle being accepted in mainstream economic circles, but there has been an increase of interest following the crash of 2008, with academic journals, economists, and investors discussing his theories.<sup>[6]</sup>

Economist and former columnist of the *Financial Times*, Anatole Kaletsky, argued that Soros' concept of reflexivity is useful in understanding the way in which Western analysts believe that China's "economy is not only slowing, but falling off a cliff." The perception that China is the weakest link in the global economy dominated the International Monetary Fund annual meeting in Peru in October 2015.<sup>[7]</sup> In reality, China's GDP in 2005 was \$2.3 trillion and in 2015 is \$10.3 trillion, the renminbi stabilized in October, capital flight dwindled, and according to Kaletsky, there are "better-than-expected reserve figures released by the People's Bank of China on October 7." Kaletsky claims that suspect but powerful financial feedback perceptions are constantly "self-reinforced" but that they do not reflect economic reality. According to Soros' concept of reflexivity, "financial markets can create inaccurate expectations and then change reality to accord with them. This is the opposite of the process described in textbooks and built into economic models, which always assume that financial expectations adapt to reality, not the other way round." The Chinese government's "policy of shifting gradually to a market-based exchange rate" reveals that China may better understand "reflexive interactions among finance, the real economy, and government than "Western devotees of free

markets capitalism." Kaletsky warned against making the same mistakes as those made in 2008 when "financial expectations" based on reflexivity, interacted with "policy blunders, turning modest economic problems into major catastrophes, first in the US and then in the eurozone."<sup>[7]</sup>

In 2009, Soros funded the launch of the Institute for New Economic Thinking with the hope that it would develop reflexivity further.<sup>[8]</sup> The Institute works with several types of Heterodox economics, particularly the Post-Keynesian branch.<sup>[9]</sup>

## In sociology

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Margaret Archer has written extensively on laypeople's reflexivity. For her, human reflexivity is a *mediating mechanism* between structural properties, or the individual's social context, and action, or the individual's ultimate concerns.<sup>[10]</sup> Reflexive activity, according to Archer, increasingly takes the place of habitual action in late modernity since routine forms prove ineffective in dealing with the complexity of modern life trajectories.<sup>[11]</sup>

While Archer emphasizes the agentic aspect of reflexivity, reflexive orientations can themselves be seen as being *socially and temporally embedded*.<sup>[12]</sup> For example, Elster points out that reflexivity cannot be understood without taking into account the fact that it draws on background configurations (e.g., shared meanings, as well as past social engagement and lived experiences of the social world) to be operative.<sup>[12]</sup>

## In anthropology

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In anthropology, reflexivity has come to have two distinct meanings, one that refers to the researcher's awareness of an analytic focus on his or her relationship to the field of study, and the other that attends to the ways that cultural practices involve consciousness and commentary on themselves.

The first sense of reflexivity in anthropology is part of social science's more general self-critique in the wake of theories by Michel Foucault and others about the relationship of power and knowledge production. Reflexivity about the research process became an important part of the critique of the colonial roots<sup>[13]</sup> and scientific methods of anthropology in the "writing cultures"<sup>[14]</sup> movement associated with James Clifford and George Marcus, as well as many other anthropologists. Rooted in literary criticism and philosophical analysis of the relationship of anthropologist, representations of people in texts, and the people represented, this approach has fundamentally changed ethical and methodological approaches in anthropology. As with the feminist and anti-colonial critiques that provide some of reflexive anthropology's inspiration, the reflexive understanding of the academic and political power of representations, analysis of the process of "writing culture" has become a necessary part of understanding the situation of the ethnographer in the fieldwork situation. Objectification of people and cultures and analysis of them only as objects of study has been largely rejected in favor of developing more collaborative approaches that respect local people's values and goals. Nonetheless, many anthropologists have accused the "writing cultures" approach of muddying the scientific aspects of anthropology with too much introspection about fieldwork relationships, and reflexive anthropology have been heavily attacked by more positivist anthropologists.<sup>[15]</sup> Considerable debate continues in anthropology over the role of postmodernism and reflexivity, but most anthropologists accept the value of the critical perspective, and generally only argue about the relevance of critical models that seem to lead anthropology away from its earlier core foci.<sup>[16]</sup>

The second kind of reflexivity studied by anthropologists involves varieties of self-reference in which people and cultural practices call attention to themselves.<sup>[17]</sup> One important origin for this approach is Roman Jakobson in his studies of deixis and the poetic function in language, but the work of Mikhail Bakhtin on carnival has also been important. Within anthropology, Gregory Bateson developed ideas about meta-messages (subtext) as part of communication, while Clifford Geertz's studies of ritual events such as the Balinese cock-

fight point to their role as foci for public reflection on the social order. Studies of play and tricksters further expanded ideas about reflexive cultural practices. Reflexivity has been most intensively explored in studies of performance,<sup>[18]</sup> public events,<sup>[19]</sup> rituals,<sup>[20]</sup> and linguistic forms<sup>[21]</sup> but can be seen any time acts, things, or people are held up and commented upon or otherwise set apart for consideration. In researching cultural practices reflexivity plays important role but because of its complexity and subtlety it often goes under-investigated or involves highly specialized analyses.<sup>[22]</sup>

One use of studying reflexivity is in connection to authenticity. Cultural traditions are often imagined as perpetuated as stable ideals by uncreative actors. Innovation may or may not change tradition, but since reflexivity is intrinsic to many cultural activities, reflexivity is part of tradition and not inauthentic. The study of reflexivity shows that people have both self-awareness and creativity in culture. They can play with, comment upon, debate, modify, and objectify culture through manipulating many different features in recognized ways. This leads to the metaculture of conventions about managing and reflecting upon culture.<sup>[23]</sup>

## Reflexivity and the status of the social sciences

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Flanagan has argued that reflexivity complicates all three of the traditional roles that are typically played by a classical science: explanation, prediction and control. The fact that individuals and social collectivities are capable of self-inquiry and adaptation is a key characteristic of real-world social systems, differentiating the social sciences from the physical sciences. Reflexivity, therefore, raises real issues regarding the extent to which the social sciences may ever be viewed as "hard" sciences analogous to classical physics, and raises questions about the nature of the social sciences.<sup>[24]</sup>

## See also

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- Campbell's law
- Double hermeneutic
- Goodhart's law
- Hawthorne effect
- Observer effect (physics)
- Observer-expectancy effect
- Performativity
- Virtuous circle and vicious circle

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