

**Research for Activism and Institutional Ethnography:
Understanding social organization from inside it**

Presented at:

Sociology for Changing the World:
Political Activist Ethnography Conference

Laurentian University, Sudbury
Nov 8-10, 2002

Marie L. Campbell
Professor Emeritus
Faculty of Human and Social Development
University of Victoria
Victoria, BC, V8W 2Y2
mariecam@uvic.ca
Phone: 250-595-7364

Abstract

The author identifies a particular kind of insider *analysis* as the crucial feature of George Smith's (1990) groundbreaking activist work and in this paper illustrates how analysis in institutional ethnography can help activists determine an effective direction for struggle. A fragment of data from research on health care experiences of people with disabilities (Campbell, Copeland and Tate, 1999) is analysed to show how a ruling perspective subordinates concerns of people with disabilities about the hourly assignment of home support workers. The paper suggests that confrontation of agency personnel on this contentious issue would stay at the level of competing perspectives unless those taking the side of people with disabilities have an accurate analysis of how assignment of workers routinely and invisibly subordinates experiential accounts to the ruling interests of the organization.

Specifying the project of “analysis” for activism

This conference, dedicated to the memory of George Smith and his activism, has encouraged researchers like myself to discuss what we have learned about research for activism. Some ideas of my own developed from a decade of working in disability research are the basis of this paper. How researchers can even communicate with activists is one serious problem. The problem of scholarly language in research is a longstanding point of contention. Even George Smith's (1990) writing about activist ethnography may not inspire much confidence that academics can speak to activists. While not dismissing the need to write in an appropriate way for an activist audience, here my focus is on something I consider more fundamental. The kind of research that George did changed the focus of activist-orientated research. This paper explores that change of focus.

Activists most often use research to support a direction they are taking and to provide evidence favouring their side of an argument against the other. But if we catch hold of what George Smith was doing, we see that the research that he conducted offered activists something else. It provided analytic help in *determining an effective direction for activism*. My own contribution here is to suggest how research as George was doing it, and as institutional ethnographers have continued to develop it, relates to analysis – analysis that works for activism. Using a study on health care experiences of people with disabilities (Campbell, Copeland and Tate, 1999), I demonstrate how I see institutional ethnography contributing insights that can help activists focus their struggles.

While I have been working for a number of years with a group of disabled people, and I will draw on that work today, I remain primarily a researcher and teacher, not an activist. To help me think through my ideas and prepare this presentation, I consulted a friend and former student, Pat Larson, who is a street nurse working with community-based agency in Toronto. Her accounts of one of her own recent struggles initiated by an outbreak of tuberculosis in Toronto's homeless shelters are woven into this paper. Because of her activist profile, Pat had been involved in a committee of the City's Health Department that is responsible for planning TB prevention¹. The TB committee's responsibility is to develop an adequate policy. Pat spent months on her contribution to

¹ The Board of Health of the City of Toronto is responsible for policy and fiscal decision-making in relation to the city's public health. Pat Larson sits on the Board of Health's TB sub-committee which was re-constituted, following the TB outbreak, to add two street nurses to the mix of “experts” in TB and public health. Street nurses had been pressuring the Health Department in relation to what they saw as its inadequate practices with homeless people. Perhaps in response, the TB sub-committee formed two new working groups, one of which Pat co-chairs. Her working group is organized to address TB among people who are homeless and/or have a recent history of incarceration.

this work, much of it educating her Health Department colleagues. First she and her street-level colleagues collected evidence about the new and unhealthy situations in Toronto that encourage the spread of TB. They arranged for speakers from various aspects of the field, and discussed and explained the dangers to Health Department staff who themselves lacked street-level expertise. She contributed hours of work to writing reports and recommendations. When she presented the recommendations to the relevant group at the Health Department, she had the experience of having her presentation undermined by the City Health Department personnel from her own committee². While this was unexpected in the circumstances of collaborative committee work, Pat points out that she is familiar with the way that the authorities she meets in her position as street-nurse frequently downplay her accounts of troubles faced by the homeless and dismiss her recommendations for action. She finds it uncomfortably commonplace for people in official positions to make hostile and disparaging remarks about her and other activists.

This story can be easily generalized to many different situations that activists face – whether organizing around homelessness as Pat does, or more militantly - against war or in anti-globalization struggles. We all know what happens when activists find themselves arrayed on the opposite side of issues from those with the power to take action. Official agents of the powerful often seem to be acting from a different set of understandings, priorities and positions that, while they may not be spoken, or if spoken, necessarily rational, will nevertheless supercede the activists' views. Activists faced with the task of communicating a controversial view must find ways of impressing on the opposition the importance of this view and the different course of action it requires. In an activist leadership position, the task is to consider how to approach a problem, what pieces of the problem to concentrate on, and what course of action will have maximum impact. *This is where a good analysis is needed.* In Pat's case, after consultation with others involved in related struggles, she took her next steps vigorously and in a variety of ways. Pat knew what that would mean for her own interactions at city hall. People like herself, advocating an alternative perspective, will be treated as wrong, even embarrassingly misguided, and if they persist, they may be seen as dangerous. These are the everyday experiences of activists.

Some Concepts used in Institutional Ethnography

To move toward my project of analysis, I need to convert this account into somewhat more theoretical language. The theory and language of institutional ethnography identifies ruling relations and ruling practices as the focus of activism. As an institutional ethnographer, I would treat actors on the power-holding side of a contradictory position as holding a ruling perspective that the other side challenges. If successful, activism disrupts the ruling perspective. But the ruling side holds material resources, including the means of violence. The ruling perspective is asserted with the amount of violence needed to win. We have grown accustomed to seeing the level of animosity expressed to people demonstrating on the streets, in forests or from fish-boats when they confront the representatives of major powers and object to what they stand for.

² The meeting at which a public health official from her own working group kept arguing with Pat's report was the formal TB Subcommittee of the Board of Health. Pat's working group was presenting its report and recommendations in preparation for their subsequent presentation and approval at the full Board of Health.

I want to suggest that the kind of hostility that Pat speaks about meeting routinely in public committee rooms echoes the more physically violent repression of street confrontation. It is so important to recognize all these expressions of hostility for what they are – a feature of how a ruling perspective is maintained. On the street, physical repression is usually obvious and may be captured for the world to see by television cameras. In offices and committee rooms of Canadian public officials, the lines are more blurred. People of good will are drawn into the ruling perspective and enact it against their own colleagues, even against their own interests. Taking an oppositional stand here constitutes a different sort of risk than the physical risk to activists' bodies on the street. Both are serious and relate to the way Canadian democracy works. The ruling practices that are the object of Pat's activism represent a serious risk to democracy, all the more so because they operate quietly, they take prisoners secretly, and when this kind of ruling wins, it wins invisibly. That is the moment that my presentation focuses on. My project of analysis begins to put an everyday face to activities of this kind of ruling and shows how they operate routinely in our lives.

Institutional ethnographers accept that the people taking the opposite sides of a struggle hold conflicting positions not just as a whim. Rather, the conflicting positions are socially organized. *They are grounded and enacted in people's lives and express their interests.* (Pat would have no hesitation in declaring that her position was embedded in the needs of her constituency of homeless people. The views of those who resisted her recommendations should be understood as similarly grounded in a constituency and its own interests). Institutional ethnographers recognize that they need to approach a problem informed by the everyday/night experiences of the people *on whose behalf they are working.* We call that a "standpoint in the everyday world" (DE Smith, 1987) and institutional ethnographers claim that understanding the world from that perspective is crucial for determining the action to be taken. The question that an institutional ethnographer wants to answer is: "what organization of the world maintains the position that these people live and suffer from, and how can my research offer insight into that?" Institutional ethnographers find and use differences of perspectives analytically. Competing versions of what is happening open the door to research on how different accounts arise, how ruling accounts are organized and maintained, what is being accomplished through operating as if one perspective were the right or only way to see things, etc. The activist ethnographer, using the methods of institutional ethnography developed and taught by Dorothy Smith (1987, 1999, etc.)³, can discover how certain perspectives are embedded in officialdom and how they buttress official actions and discount other knowledge, other actions.

Different Perspectives at Work

While activists might have the urge to classify different perspectives as simply right or wrong, I am suggesting that we can expect to learn something from seeing how people's ideas are embedded within and arising from particular social locations. For instance, when members of the Toronto Board of Health work and live in places where they can avoid seeing street people in any but superficial ways, this underpins the different perspective they may hold on managing the TB outbreak. Their knowledge comes in

³ See also, Campbell and Gregor, 2002, Mapping Social Relations: A Primer in Doing Institutional Ethnography.

sterile packages, reports, statistics, and library research. Pat found that they lacked current local knowledge about the increasing level of overcrowding in jails and homeless shelters, the effect of Hepatitis C and other infections contributing to a generalized decline in health status of the dispossessed – and how this was implicated in the spread of tuberculosis. Her committee work tried to broaden a narrow perspective on responding to the outbreak of TB, influencing the course of action taken. She spoke from a standpoint in the experience of the street people and, as a street nurse she interpreted their interests in planning for action. When she questioned her committee colleagues about the resistance that they had mounted against her recommendations, one member of the committee, a manager of the TB program, explained that she was obligated to “not make recommendations to City Hall that cost the city more money”. That comment leads to discovery of the socially organized ruling practices of city government.

Pat was attempting to influence a course of action undertaken within a public institution, using public funds, implementing public policy. Her concerns about the TB program were intended to address the actualities of the lives of people living on or near the street. Pat’s representation of the problem and how it should be handled would be easily identified with a minority group’s interests. It may not be so easy to identify interests within officialdom. Official views are usually represented as being neutral, and their actions taken in the public interest, advanced for the common good. Beyond critique of differing perspectives, activists must learn how to understand and engage with official actions embedded in public policy and public administration. Ruling interests are enacted routinely through specific administrative practices. When attempting to intercede on behalf of marginalized people, activists must discover how their constituency’s interests are marginalized in routine organizational action.

The resistance to Pat’s ideas came at the point where they were moving toward being embedded in organizational policy, through which they would acquire the force of organizational funding, etc. With the recognition that perspectives always have a social location, analytic attention shifts away from what people say to how their views are embedded in practical action. This highlights what people *do*, as well as what they say or believe. The social organization that structures public action was the focus of George Smith’s research and it is also my focus here. When George explored the social organization of AIDS treatments and discovered that they were embedded in public health policy and practices, he saw how they addressed interests that were not those of people with AIDS or HIV. This was a moment of analysis and discovery that turned out to be crucial for George’s strategizing in AIDS Action Now.

I now turn to a discussion of data from my own research, in an attempt to demonstrate in more detail how a similar kind of analysis proceeds. I begin by identifying conflicting perspectives on how services are delivered to people with disabilities and how well they work. Then I show how an official perspective is embedded in the mechanisms underlying delivery of these services. My analysis is offered here to suggest how a ruling perspective becomes and stays dominant. In this case, it becomes apparent that the concerns of people with disabilities get subordinated to the official version routinely, without any intention by agency personnel to discriminate, or dismiss what their clients say. We can see how good intentions to serve the public are not enough.

I need to set the stage with a bit of background about the study cited (Campbell, Copeland and Tate, 1999) on the operation of a Home Support program providing

services to people with disabilities. In the mid-nineties, we studied how the program worked from the perspective of service recipients as well as those who planned, organized and managed, supervised and delivered the services. We discovered, among other things, how beliefs about good practice expressed in policy and program descriptions, or personally, by professional leaders and managers, were often contradicted in actual practice. The situation I have chosen to discuss here concerns the hourly assignment of Home Support workers to clients with disabilities. The work to be done was personal service such as bathing, dressing, food preparation, etc., things that were necessary for everyday life to proceed. The disabled clients complained about their troubles with agencies that frequently assigned to them workers whom they did not know and who didn't know how to take care of their particular needs. They were of the opinion that the agencies did not appreciate the importance to them (the clients with disabilities) of having consistent workers. Yet, from agency officials we heard assurances that everyone hired to do home support work was trained and skilled. We discovered that both the health care authority and the agencies we studied took "continuity of workers" to be one of the principles underlying their mission for giving good client-centred care. This principle was featured prominently in the agency's policy statements and in union contracts. The staff understood and talked about continuity of workers. Agency supervisors and scheduling clerks held it to be a routine feature of their practice to assign workers to the same clients over time. (Of course, everybody was attuned to overriding issues of scarce resources and how that, unfortunately, compromised good intentions to some extent).

When we tried to match up our observations of what actually was happening with expressions of organizational beliefs we saw that we couldn't. They continually came apart. Organizational accounts did not usually express what we were seeing. This was especially the case regarding the different perspectives on assigning the same workers *consistently* to clients. In our field research, we had observed the kind of difficulties a "new" worker (meaning, previously unknown to the particular person with a disability) could create for the people who needed specialized attention. Our observers actually saw dangerous things happening in a client's home when a member of the casual workforce attempted to conduct personal care for a disabled client. In one case, it was apparent that a casual worker was inadequately prepared to work with this client's particular needs.

This example of different perspectives about continuity of workers assigned to clients is the kind of thing that institutional ethnography can investigate. As already discussed above, our theory tells us that a difference in perspectives is not just a matter of opinion but is *organized* somehow. An institutional ethnographer would look for the ruling practices that organize the dominant perspective and that is the analysis I now turn to. I draw on observations of a home support clerk "scheduling" workers into work assignments, using a computerized system. A fragment of data is analysed to illustrate how the knowledge held by differently located knowers and arising in different processes of knowing could be so different.

The Analysis: How the Standpoint of Ruling Pervades the Local Setting

In the excerpt of data here, a clerk who assigns workers to clients is talking about what she is doing, for the benefit of a researcher who sits beside her at her workstation. A call has come into the agency and to her desk ordering an increase in home support hours

for a regular client of the agency. From the clerk's comments, you can hear that in her assignment work she recognizes the necessity of reducing to a minimum the number of workers whom this client must interact with. She says:

This lady gets service every evening at eight o'clock. What I need to do now is I need to set up (for extra service) every morning at eight o'clock. I want to use as many of the evening workers as I can to keep the number of workers down.
(Campbell, Copeland and Tate, p. 56)

Her intention is to assign workers so that "continuity" can be maximized. She goes to work on that while the observer watches and listens. The clerk's resources are programmed into the computer system and she begins to scroll through the computer program looking at lists of workers, their current work assignments, and their availability at the newly required time. Her comments as she does so begin to suggest that continuity of worker may not be the only concern that she has. She says "*we have to schedule the most senior worker that is available*". For an institutional ethnographer, the notion of "most senior worker" indicates that some social organization external to the relationship between a prospective client and a home support worker is being alluded to here. These words are clues to the social relations organized outside this setting and penetrating it, through the knowledge, skills, work organization, etc., of the clerk. [Note that because this organization is external and not available in the observational setting, it had to be followed up after the observation is done. It turns out that "seniority" is a reference to a contractual agreement between the agency and the workers' union.] What the observer sees in the setting is that "seniority" is the clerk's first priority. As the observer watches, "seniority" has just superseded the clerk's commitment to "continuity", even though at the moment of taking this action, she treats it as a routine condition of doing scheduling. Later, as the inquiry addresses the union contract, we learn that provisions in the contract allow the seniority clause to be overridden at the discretion of the agency, but for a busy clerk this would be another complication to her already complex and time-sensitive job. There was no mention of this possibility as she went on, searching for the most senior available worker, one whom she hopes this client already knows. As it happened, although she found on her list several workers known to the client, all were judged to be inappropriate for a number of organizational reasons. While I won't extend this data analysis further, it turns out that besides seniority, efficient use of workers' time and an underlying concern about adhering to the agency budget were never far from the clerk's mind. As an ordinary feature of agency life, her commitment to producing continuity for clients is continually disorganized and superseded by a number of organizational issues that enter into the scheduling process in routine but apparently unnoticed ways.

This analytic fragment about scheduling Home Support workers illustrates the institutional processes through which ruling practices subordinate and write over experiential knowing. The clerk's scheduling activities, her know-how and familiarity with workers and clients and their wishes and needs were appropriated to the agency's ruling interests in productivity and efficiency in the use of paid labour of workers. These data illustrate the force that labour agreements exert over concerns for clients' comfort. This is a ruling practice vested in legal processes. Managing such agreements in an

agency is complex textual process that because of the power of unions to hold agencies to account automatically superceded the mission statements about client-centred care.

I want to be clear here that *my analysis is not itself a critique*. I am not criticizing this clerk and how she did her work. Nor is it an anti-union critique. The rights of Home Support workers certainly need to be protected. Nor am I criticizing the agency or the health authority. Of course, they may all need and might actually benefit from critique. I am offering this fragmentary analysis as an illustration of the social organization of assignment of workers to clients and how it departs from what is known about it. We get a glimpse here of ruling practices: intentions to address clients' interests are actively being subordinated. The tools of ruling are discursive. The discursively organized work process allows the organization's actual priorities to be addressed *first*, by providing, among other things, a computerized list of workers in order of their seniority. The harnessing of the computer's capacity supports the cost-efficient management by listing cumulative hours assigned to each worker, assuring that no assignments exceed a time limit of "regular" payment (avoiding overtime pay). The clerk's knowledge of the clients (their addresses, etc.) assures that assignments are made in such a way as to avoid wasting workers' paid time in travel. This is how ruling happens and how in local settings ruling practices are employed in ways that reorganize, displace and discount clients' experiential knowledge. I am making the point that this social organization of local settings happens in routine organizational practices that, until they are explicated through a conscious application of research methodology, will go unnoticed.

As long as that happens, confrontation on this issue is likely to stay at the level of different perspectives, with clients' voices being subordinated routinely. For instance, doing this scheduling to accomplish organizational goals did not undermine the clerk's belief in her attentiveness to the goal of continuity of workers. Nor did it interfere with the health authority's or agency's claims to give excellent home care to people with disabilities – care that was said to be client-centered and to offer continuity of workers. Nothing about the routine practice of assigning "hours of work" to clients would shake the authoritative claim the organization made about its commitment to continuity of care, regardless of what clients said. What we can see in this analysis of discursive organization is that the official knowledge of the nature of care in this setting is (what institutional ethnographers call) "ideological". That is, it arose from sources that were internal to the management of the organization and that were almost entirely split off from the people who, day after day, find a parade of different, often "casual" and inexperienced, workers appearing in their homes to provide needed personal care.

Conclusion: knowledge, experience, and research in the interests of people

This paper identifies and describes one form of activist research, beginning with activists dissenting from an established ruling position and putting themselves on the line in behalf of a constituency whose interests are at stake. I have drawn attention to the importance to various forms of action – both official and oppositional - of authoritative knowledge. Ruling is a practice of knowing that commands resources and authority. I contend that research on the precise details of how ruling works is central to an activist project and that institutional ethnography makes this contribution. Activism can be strengthened by understanding how ruling interests are substituted for the interests of the activists' constituency – in particular discourses, organizational undertakings and

decisions. My particular message here is about how institutional ethnography can help specify the practices of ruling that are operative in any particular struggle. I am recommending institutional ethnography as a materialist, over an ideological (or as George Smith called it, a speculative) analysis. Of course, so much remains to be said about all this. Left unstated until now is my belief that struggle against oppression has room for and need of all kinds of actions, from street protest to policy development, and thus has need of the various kinds of research that support each. I am not making the claim that institutional ethnography is the only research needed for activism.

I raise this point because I want activism to be a collective effort. In the area of disability activism, I am learning about the debates within the movement about different perspectives and who has or can have the correct line on struggle. In situations like this, institutional ethnography's project of analysis is particularly helpful because it forces analytic attention back to the social organization of what is happening. A claim to knowing based on the knower being in the right category (e.g., disabled) or using the right theoretical conception (e.g., social model of disability or emancipatory research) can fail if the research itself lacks a secure grounding in the everyday world. To be fair, I think that that is the goal of disability theorists – to insist that researchers actually have a knowledge basis in the experience they analyse. But nothing about being “in the know experientially” insulates us from being drawn into a ruling perspective. I suspect that we have all had the experience of seeing someone we know to be “one of us” taking a position that does not represent the interests of our constituency. There are many opportunities for people from our side to take up the ruling perspective as their own, usually unknowingly. The kind of analysis that I am recommending here clarifies how ruling practices accomplish just that.

Acknowledgements

I want to express my gratitude to Pat Larson, RN, MN, who generously shared her experiences of social activism with me and allowed me to use them for my purposes in this paper. Also, for funding support for the research reported in Campbell, Copeland and Tate, 1999, I thank the BC Health Research Foundation, the Social Sciences and Humanities Research Council of Canada/ Human Resources Development, Canada, and The Vancouver Foundation. I also thank all my colleagues in Project Inter-Seed whose efforts, knowledge and enthusiasm made that research possible.

References

Campbell, M. 2002, “Disability Research and Institutional Ethnography: Exploring ‘social organization’ from inside it”, a paper presented at the Nordic Network on Disability Research, Reykjavik, Iceland, August 22-24.

Campbell, M., B. Copeland and B. Tate, (with assistance from the research team), 1999, Project Inter-Seed: Learning from the health care experiences of people with disabilities, The Final Report, submitted to BC Health Research Foundation, December. 109 pages.

Campbell, M. and Frances Gregor, 2002, *Mapping Social Relations: A Primer in Doing Institutional Ethnography*, Aurora, ON: Garamond Press.

Smith, Dorothy E., 1987, *The Everyday World as Problematic: A Feminist Sociology*, Toronto: University of Toronto Press.

Smith, Dorothy E., 1999, *Writing the Social: Critique, Theory and Investigations*, Toronto: University of Toronto Press.

Smith, George W., 1990, "Political Activist as Ethnographer" *Social Problems* Vol. 37, No. 4, pp. 629-648. Also, see a revised and abridged version of this paper in M. Campbell and A. Manicom (eds.) 1995, *Knowledge, Experience and Ruling Relations: Studies in the Social Organization of Knowledge*, Toronto: University of Toronto Press.