Outsider positioning in action research: Struggling with being on the outside looking in

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This paper outlines a number of issues I have encountered owing to my status as an ‘outsider’ action researcher in several research and consulting projects. In this paper I focus primarily on the practicalities of being on the outside looking in, although I incorporate some theory by suggesting that it is useful to examine insider/outsider position through the lens of social identity theory. I term myself an ‘outsider’, but my experience has been that boundaries between outsiders and insiders are mutable. I offer a reflection on the dynamics of these changing boundaries from the perspective of someone entering a setting to conduct research in a collaborative way with practitioners within the setting.

Position in Insider/Outsider team research

Bartunek and Louis (1996) describe insider/outsider team research as a type of collaborative research where insider are practitioners who are invested in the setting and must understand it in order to operate effectively within it. Outsiders, as the term suggests, enter the setting on a temporary basis for the purposes of conducting research, meaning that their “more personally consequential settings are elsewhere” (Bartunek and Louis 1996 p.3).

Ritchie et al (2009) and Bartunek (2008) suggest that the positions of insiders and outsiders within collaborative and participative research approaches can be viewed as existing along a continuum with the potential for the position of individuals to alter during the course of a research project. I suggest that this notion can be extended utilising social identity theory which gives a socio-psychological perspective on behaviour. Social identity is regarded as:

“that part of the individuals’ self-concept which derives from their knowledge of their membership of a social group (or groups) together with the value and emotional significance attached to that membership”. (Tajfel 1981 p.255)

Accordingly, social identity theory can be used as a means of examining the position of outsiders within a group in insider/outsider team research. Nevertheless, insiders cannot be regarded as forming a homogenous group (Merriam et al 2001). This is particularly true for insiders on inter-organisational groups where institutional influences and organisation cultures, goals and perspectives may differ and individuals may identify to different extents with the group. Nevertheless, in my experience, despite possible differences among members of groups of insiders, they have invariably identified more with each other at the outset of the research process, and regarded me, the researcher, as the outsider in the situation.
Initial positioning: On the outside looking in

Over the past decade, I have been involved in a number of research and consulting projects. My role within each project has been that of an outsider entering a setting in order to facilitate change within the setting by engaging with a group of insiders. These groups have been composed of members from one organisation or from different organisations working on a collaborative venture.

My position as an outsider means that I begin each endeavour struggling with a sense of only scratching the surface. This is a consequence of my unfamiliarity with the setting within which I find myself. Insiders are already familiar with the common language within the organisation, group or area of practice including the “jargon” and “window dressing” (Coghlan and Brannick 2010 p.115), whereas, as an outsider, I find it confounding. This sense of unfamiliarity means that I have always identified myself at this point in the research process as an outsider looking in.

This positioning comes with advantages and disadvantages. My position of outsider means that I enter each situation knowing little or nothing about that particular situation. This can make negotiations difficult due to my unfamiliarity with individuals, structures, politics, culture and jargon. In one collaborative consulting project working with an inter-organisational group, my lack of knowledge about the situation meant that I was unaware that within the main group were subgroups with which group members socially identified. Their identification with these subgroups was emotionally and politically charged. My questions to establish context resulted in my stirring up issues regarding relationships between the organisations. Because of my unfamiliarity with people and politics I was not equipped to deal effectively with the ensuing political fall-out which took weeks of negotiations to resolve and impacted negatively on the forward momentum of the project. In contrast, attempts to establish context can have the advantage of providing the stimulus for insiders embedded within the setting to question taken-for-granted assumptions (Hurley et al 2002). For example, in a recent project, insiders within an inter-organisational group engaged in discussions and negotiations around role boundaries due to my queries about the roles of different organisational representatives on their group. Unlike the first example provided, these discussions were positive and action-oriented and resulted in the development of greater clarity on roles.

Champions are important in attempts at organisational change (Greenhalgh et al. 2004), and in my experience as an outsider researcher, finding insiders to effectively champion change and provide practical aid is essential to the success of an initiative. Yet an outsider does not have the tacit knowledge to know who to approach, which an insider gains through operating in a particular environment, nor as Greenhalgh et al. (2004) highlights, is there direction provided in the literature on identifying and energising potential champions. My lack of familiarity with power relationships, culture and people has at times impacted negatively on my ability to identify the appropriate individuals to approach. This in turn has had a detrimental effect on my ability to gain support which in turn has had negative consequences on attempts to achieve change.

Negotiating power issues within groups is also important (Bradbury and Reason 2006). At the outset of a research or consulting project, my social identification by others as an outsider and an ‘expert’ has generally meant that I have been invested with power by others in the group. Yet the philosophy that underpins my worldview and the ways in which I engage in research, is a collaborative and participative one which is based on sharing power. This means that I
find myself in the paradoxical situation of wielding power in order to facilitate others to empower themselves. This is referred to by Lewin (1948) as the paradox of democracy and is something I struggle with during each research project, particularly in the initial stages.

**Shifting sands: Negotiating Insider/Outsider Boundaries**

In my experience, an integral part of collaborative research is the shifting social identity of outsiders and insiders as a study progresses beyond its initial stages. This occurs because drawing on different ways of knowing by combining the perspectives of outsiders and insiders, which is one of the advantages of engaging in collaborative action research, occurs though creating spaces for dialogue and reflection (Heron and Reason 2006). Within these spaces, insiders learn to question some of their taken-for-granted assumptions while I, as an outsider, gain knowledge about the culture, structures, politics and language within the research setting. As insiders question assumptions, they learn to view the world from my perspective. Similarly, as I learn more from insiders, my perspective also shifts based on their perspectives. This shift in perspectives has resulted on a number of occasions in a complete dissolution of insider/outside boundaries by the end of the study with the result that I have become identified by myself and group members, as a group member. In other instances, this shift in perspectives has not resulted in such an extreme shift in social identification with the group, but some changes in attitude have occurred as practitioners have begun to regard me as less of an outsider.

A shift in perspectives and social identity can be regarded as a positive. For me, as it occurs, my sense of bafflement due to being on the outside looking in dissipates, to be replaced by a sense of greater understanding. This understanding allows me to have growing confidence as a researcher in my description and analysis of a situation. Similarly, it can be argued that the thick descriptions of a situation advocated by Reason (2006) to ensure the quality of an action research study would not be possible without this understanding. Nevertheless, greater identification with a group has also created a predicament for me as an outsider researcher. It has been argued that one of the advantages of having outsider researchers on a group is that they bring an outside perspective and therefore greater objectivity (Bartunek 2008). Although Merton (1978) cautions against the assumption that being an outsider researcher equates to having objectivity within the research process and action researchers do not aim or claim to be objective (Fals Borda 2006), my experience has taught me that insiders value an outsider perspective which offers some objectivity. However, I find that as I identify more with the group with which I am conducting research, I begin to lose my initial levels of objectivity. This makes it important for me to make my changing position and changing objectivity a focal point for reflection and in some cases, group discussion.

**Making the most of being an outsider**

How then can one optimise the advantages and minimise the risks associated with an initial position as outsider? I suggest that there are three key areas for action and reflection. The first is developing a critical awareness of one’s position within a group, the second is critically reflecting on power within and outside a group and the third is to focus on promoting positivity and developing trust in interactions with insiders.

Striving for critical awareness of one’s own position with regard to other group members is a key process in developing an awareness of the quandaries inherent in being an outsider developing relationships with a group of insiders. This involves being reflexive about one’s social identification with a group, or sub-groups within a group, and how and why this might change. It may also involve sharing some of this reflection with other group members in
order to socially construct meaning about social identification within the group and what this means in the research process. For example, establishment of clarity on roles has been previously highlighted as an important facilitator in collaborative endeavours (Huxham and Vangen 2001). Expectations regarding one’s role as an outsider within insider/outsider team research must be carefully negotiated, especially as this role may mean that one is invested by others with expert status. Engaging with an outsider who is invested with this status intimidates some insiders making them less likely to engage in group discussions while others are tempted to divest all of their authority to an outsider ‘expert’, expecting the outsider to independently furnish solutions to any issue encountered by the group. To avoid this, group discussions on the role of the outsider are essential in the initial stages of engagement. In these discussions the importance of the practical knowing of insiders as well as their expertise in the field should be brought to the fore.

Grieves (2010) suggests that the very act of intervening in an organisation is an exercise in power. Outsider researchers are often invested with this power and can use it in positive or negative ways. Rather than denying this power, outsider researchers should strive to engage with the paradox of democracy by endeavouring to use power in a positive way in order to empower others. Stewart and Rigg (2011) offer a number of areas on which to reflect to help achieve this aim: awareness of one’s own potential power, both as an individual and as a perceived expert; reflection on appropriate use of this power; awareness of the power of others; and awareness of the potential to disempower others. I suggest that as an outsider researcher one should, in particular, accentuate the value of practical knowing, acknowledge one’s own limitations in this regard and actively ensure that the voices of all participants are heard and valued. As power relationships within groups can mirror those within or between organisations (Stewart and Rigg 2011), one must also strive to become critically aware of organisational and institutional influences on a group.

Outsiders can view the potential for success of each collaborative effort as considerable since their views are not generally coloured by past failures, organisational and inter-organisational politics or other barriers that may seem insurmountable to an insider. This can bring a fresh perspective to a group if an outsider takes a positive approach to problem solving. A positive approach does not mean dismissing the concerns of insiders, nor does it mean taking an appreciative inquiry approach where the focus is not on problems. Instead it means finding ways to approach problems in a positive way, where the underlying assumption is that the group will find a solution. Within this approach, in order to build confidence and a positive attitude, it is important for groups to focus on short-term, achievable objectives that cumulatively lead to the achievement of a larger goal, since building on short term successes is a method that has been previously reported in the literature as effective in efforts at collaboration (Huxham and Vangen 2001). Linked with this positive approach is a focus on developing trust within a group. As an outsider, to build this trust one must strive to seek feedback from all, acknowledge one’s own limitations, clarify decisions and roles, respect diverse views and accept that there will be conflict and negotiate that conflict.

Being an outsider within outsider/insider team research can be both difficult and rewarding. This paper provides some of my own experiences as an outsider with the aim of highlighting the importance of reflexivity and critical awareness in optimising the advantages and minimising the disadvantages of the position.
References


