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Advancing Social Transformation Through Occupation: A Critical Examination of Epistemological Foundations, Discourses and Contextual Factors Shaping Research and Practice

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Graduate Program in Health and Rehabilitation Sciences
A thesis submitted in partial fulfillment of the requirements for the degree in Doctor of Philosophy
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Abstract

Widespread appeals to advance a social justice agenda have emerged within health-related fields. However, expressing a commitment to social justice has created tensions within occupational science and therapy as scholars attempt to enact social transformative scholarship while at the same time having roots within health sciences, a field largely dominated by positivist/postpositivist thinking. The broader intent of this thesis is to inform further development of occupation-based social transformative scholarship aligned with the critical paradigm.

This doctoral dissertation is comprised of five integrated manuscripts, in addition to introduction and discussion chapters. Chapter two examines the increasing use of critical perspectives and outlines the ways in which these perspectives have challenged the assumptions underlying occupation. Chapter three introduces critical reflexivity and critical epistemology, illustrating their importance in examining the beliefs guiding occupation-based work that attempt to promote occupational justice. Chapter four introduces transformative scholarship and raises three problematics to illustrate the dangers of relying on positivist/postpositivist assumptions in frameworks promoting social transformation. Chapter five presents a critical dialogical approach as one way forward in expanding research that can inform social transformation by incorporating dialogue and examination of taken-for-granted understandings that shape practice.

Chapter six examines the experiences of individuals attempting to enact occupation-based social transformative practices by using a critical dialogical approach. A critical discourse analysis that deconstructs and situates participants' experiences within larger discourses is presented. The findings illustrate how discourses and contextual forces create tensions for social transformative practices, and how individuals negotiate and/or resist these tensions. Chapter seven highlights the implications of this thesis for occupational science and therapy, other professions, and critical qualitative inquiry.

This thesis contributes to the ongoing discussions about the theoretical underpinnings and approaches that occupational science and therapy need to embrace to move forward in

critically-informed and socially responsive ways. It adds to this body of knowledge through illustrating how knowledge and practice are shaped by broader forces that can frame attempts to enact transformative work in ways that obscure the structural causes of inequities. Additionally, it contributes to epistemological and methodological discussions that seek to develop appropriate ways to move in transformative directions.

Keywords: Critical social paradigm, critical epistemology, critical reflexivity, transformative scholarship, occupation-based social transformative practices, critical dialogical approach

Co-Authorship Statement

I, Lisette Farias Vera, acknowledge that this thesis includes five integrated manuscripts that evolved as a result of collaborative endeavors. In the five manuscripts, the primary intellectual contributions were made by the first author who: researched the methodology, designed the research, developed the ethics application, conducted the literature reviews, established relationships with participants, undertook data collection, coded the data, led the data analysis, and led the writing of the manuscripts. The contribution of the co-author, Prof. Debbie Laliberte Rudman (in chapters 2, 3, 4, 5 and 6), was primarily through supervision of the research, theoretical and methodological guidance, reflexive dialogue and intellectual and editorial support in crafting the work for publication.

The contribution of the co-authors, Prof. Lilian Magalhães (in chapters 3 and 4) and Dr. Denise Gastaldo (in chapter 4), was primarily through theoretical and methodological guidance, and reflexive dialogue.

The contribution of the co-authors, Drs. Nick Pollard, Sandra Schiller, Ana Paula Malfitano, Kerry Thomas & Hanneke van Bruggen, H. (in chapter 5), was primarily through methodological guidance, and editorial support of the first draft of the manuscript.

Dedication

Para mi hija, Matilda, quien con su presencia ha moldeado esta tesis, al igual que todos mis intereses y esfuerzos. Gracias por llegar a nuestras vidas.

To my daughter, Matilda, whose presence shaped this thesis, as well as all my interests and endeavors. Thank you for coming into our lives.

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List of Abbreviations

AT – Assistive technology

PAR – Participatory Action Research

CDA – Critical Discourse Analysis

OT – Occupational Therapy

OTs – Occupational Therapists

OS – Occupational Science

WFOT – World Federation of Occupational Therapists

NGOs – Non-governmental organizations

NPM – New Public Management

Chapter 1

1 Introduction

In line with increasing attention to the transformative potential of occupation to respond to situations of oppression and exclusion (Guajardo, Kronenberg, & Ramugondo, 2015; Laliberte Rudman, 2015; Pollard, Sakellariou, & Kronenberg, 2008; Sakellariou & Pollard, 2017; Townsend, 1997; Watson & Swartz, 2004), my doctoral work has been stimulated by the growing international movement within occupational science and occupational therapy that seeks to move beyond traditional frameworks of research and practice to take up the discipline and profession's social responsibility to the people with whom we engage (Frank, 2012; Galheigo, 2011; Whiteford & Hocking, 2012). Further, my work has been influenced by a growing political awareness, characterized by a questioning of the role of occupational science and therapy in society, what type of science that occupational science is or should be, and the types of boundaries within which the discipline and profession have operated (Kantartzis & Molineux, 2011; Laliberte Rudman et al., 2008; Townsend, 2012). This political awareness has been particularly important for me as a South American occupational therapist. I share scholars' concern regarding the limits that a Eurocentric and individual-focused conceptualization of occupation imposes when trying to understand the diverse ways in which occupation is enacted and shaped by social and political processes (Laliberte Rudman, 2013; Whiteford & Hocking, 2012). As such, this work adds to this growing political awareness by examining how individual-focused conceptualizations of occupation, in concert with other contextual forces, can constrain social transformative efforts that aim to make a difference in people's lives by promoting social justice.

From this standpoint, my intentions are aligned with those advocating for expanding the occupational agenda to integrate diverse perspectives of occupation and consider the situated nature of occupation and its role within the hegemonic social order (Angell, 2012, Hocking, 2009, Laliberte Rudman 2015). In this way, I see my work as an attempt to respond to the calls for a more critical and socially responsive discipline (Angell, 2012; Laliberte Rudman 2014, 2015; Townsend, 2012; Whiteford & Hocking, 2012) by

supporting the development of occupation-based work that embrace diverse worldviews, attending to the role of occupation within power relations, and mapping out ways to develop occupation-based practices that promote transformation of socio-political practices, systems and structures that (re)produce inequities. Consequently, the broader intent of this thesis is to inform further development of occupation-based social transformative scholarship¹ aligned with critical epistemology, building on the work of those who have begun to forward a vision of social transformative work in occupational science and therapy.

I begin this chapter with an overview of the rationale behind this dissertation. I then describe the purpose of this work as well as the specific objectives guiding this critical scholarship. Next, I define key terms used within this work: occupational therapy, occupational science, occupation, social transformation, occupation-based social transformative practices, social justice and occupational justice. As this thesis has been written in an integrated-article format, I situate the dissertation by explaining how issues of positionality (e.g. influence of my background and theoretical influences) shaped the research process and how I, as a researcher came to study this topic. Lastly, I include a detailed description of the structure of the thesis by outlining the chapters included within this dissertation.

1.1 Rationale

The critical work presented in this dissertation accomplishes a series of objectives. First it synthesizes and critically examines how critical perspectives have been taken up in the occupational science literature to challenge the discipline's foci, assumptions and potential for engaging in social transformative processes (Chapter two). In addition, chapter two provides an overview of how the call for a socially responsive and critical discipline has evolved and been enacted, and raises awareness of the directions that are

¹ Please note that in this dissertation the term scholarship is used in a broader sense that not only means engaging in inquiry, but also stepping back from one's position to look at the possible connections between theory, practice and teaching. Thus to be a scholar, according to this definition, means that knowledge is acquired through synthesis, inquiry, practice, and teaching (Boyer, 1990).

surfacing within this field, requesting a clarification of what is meant by ‘transformative’ scholarship and an articulation of its guiding moral basis. It also introduces some key questions that guided the development of this thesis such as; how can we, occupational scientists and therapists, move forward as a socially and politically engaged discipline and profession? How can we take up the calls to attend to the transformative potential of occupation in practice? How can we best address the occupational injustices that are being deconstructed and critiqued?

Second, this critical work attempts to address an apparent hesitancy within occupational science and therapy to fully embrace a commitment to social change, and move beyond stated intentions to enhance social justice through occupation (Magalhães, 2012; Whiteford & Hocking, 2012). In bringing attention to this apparent ‘stuckness’, chapters three and four establish theoretical justification for exploring critical epistemology and transformative scholarship on the premise that becoming ‘unstuck’ requires a re-visiting of the epistemological foundations that shape occupation-based knowledge and practice. In particular, chapter three describes a key epistemic tension between the stated intentions to demonstrate that occupation-based work can be a means to create a more just society and the epistemological beliefs that have historically dominated the profession and discipline. Further, it argues that to advance toward socially responsive scholarship that effectively addresses occupational injustices and move away from frameworks that are incongruent with social justice goals, it is vital to critically reflect on the epistemological beliefs guiding occupation-based work. Chapter four expands this theoretical argument to the fields of critical qualitative inquiry, health sciences and transformative scholarship by examining an epistemological tension inherent within two contemporary frameworks that express a commitment to social justice. By unpacking this epistemological tension, chapter four aims to heighten awareness of potential dangers associated with a reliance on or falling back onto positivist/postpositivist assumptions in frameworks aiming to promote social transformation. It also proposes reconnecting social transformative scholarship with critically informed and participatory forms of inquiry as a means forward toward developing contextually situated understandings of injustices.

Third, this critical work aims to support the development of critical and socially responsive occupation-based scholarship, arguing for the integration of critical theoretical perspectives into research and practice to avoid developing knowledge and practices that do not fully account for the complexities of people's everyday life, such as poverty and material life circumstances. To support extending the frameworks of research used in occupational science and therapy, one methodological direction for occupation-based social transformative work is presented in chapter five. As well, to support the incorporation of diverse epistemological and methodological approaches commensurate with social transformative goals, the work of Freire (1970), Bakhtin (1981) and Santos (2014) is explored. Lastly, this dissertation reports on a critical dialogical study that uses the methodological direction proposed in chapter five to promote dialogue about the challenges and tensions that may arise when attempting to enact occupation-based social transformative practices (chapter six). Additionally, chapter six focuses on the broader discourses and other contextual factors that create tensions for social transformative practices, as well as ways that these may be negotiated.

Collectively this body of work achieves several objectives aligned with critically-informed scholarship (Cannella, Pérez, & Pasque, 2015; Kincheloe & McLaren, 2005), including: a) deepening understandings of the contributions of critical theoretical perspectives for the development of occupational science and therapy, b) examining taken-for-granted assumptions and values embedded within frameworks that inform practices, c) identifying epistemological tensions between the stated intentions to address occupational injustices and the epistemological beliefs that have historically dominated occupation-based scholarship, d) revealing social and professional discourses and other contextual forces that set boundaries to practices that aim to work toward social transformation, and e) making recommendations to inform social change and increase possibilities for expanding occupation-based work to confront practices, structures and other contextual forces that govern what people can and/or want to do.

1.2 Purpose of this critical scholarship

The dissertation addresses a methodological and theoretical gap regarding the development of occupation-based social transformative scholarship, adding to the

ongoing development of occupational science and occupational therapy in the social field. Methodologically, it addresses a gap in research exploring approaches that extend beyond the traditional frameworks of research used in occupational science and therapy. It adds to the existing body of knowledge by introducing a critical dialogical approach, and illustrating the potential of dialogue and critical reflexivity to elucidate the complex challenges that emerge in professional practice. Theoretically, this work makes visible how practices that attempt to enact the potential of occupation to contribute to social transformation are shaped by epistemological assumptions, discourses and other contextual forces. It also adds to existing occupation-based research by presenting a critical discourse analysis of individuals' experiences and tensions experienced across social transformative practices, situating them within the complex landscape of social discourses and broader ideologies. For details on how each chapter adds to the purpose of this thesis, see Figure 1.

Specific objectives of this dissertation are to:

- a) Critically examine how several analyses of the discipline's foci and development, and epistemological and theoretical underpinnings have been facilitated by using critical theoretical perspectives and critical epistemology.
- b) Deepen understandings of how critical reflexivity and critical epistemology can advance social transformative practices by avoiding individualizing issues of justice and addressing injustices in ways that fail to address structural causes.
- c) Enhance understanding of the potential of critical dialogue to elucidate and reflect on the complex challenges that emerge in professional practice.
- d) Raise awareness of how occupation-based social transformative practices are shaped by discourses that can constrain the possibilities for addressing social and health inequities.
- e) Co-construct knowledge regarding occupation-based social transformative practices with individuals that are attempting to enact them.

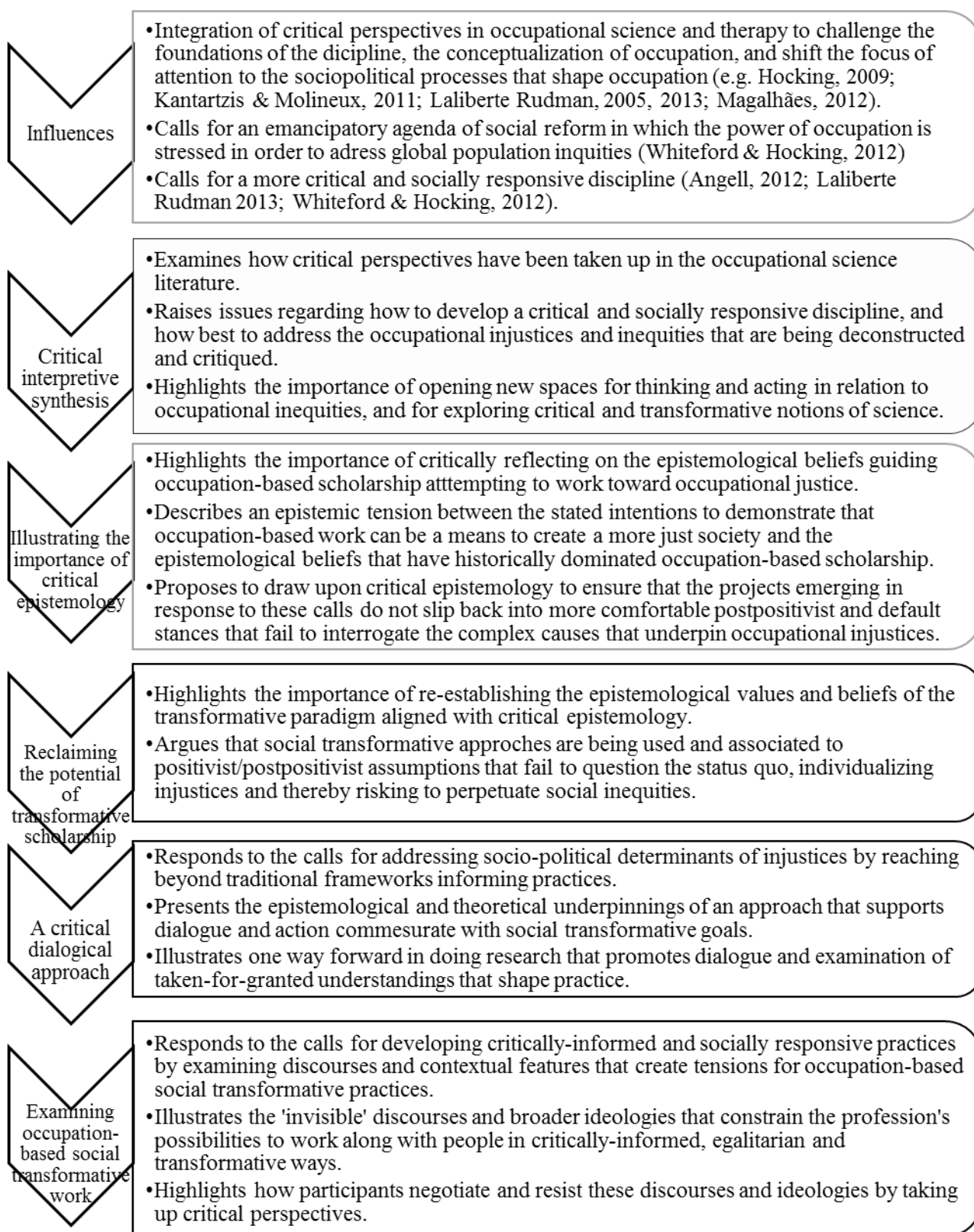


Figure 1. Overview of how each chapter adds to the purpose of the thesis.

1.3 Situating key terms

Given that terms may have multiple meanings depending on the context in which they are used, in this section I define several key terms that are employed throughout this dissertation. These terms include; occupational therapy, occupational science, occupation, social transformation, occupation-based social transformative practices, social justice and occupational justice. It is worth observing that when defining the abovementioned terms, I describe them guided by the critical stance and theoretical approaches underpinning this thesis.

1.3.1 Occupational therapy

Occupational therapy is defined as a health profession that is concerned with promoting health and well-being through occupation (WFOT, 2010). According to the World Federation of Occupational Therapists (WFOT), the primary goal of occupational therapy is to enable people to participate in everyday occupations by enhancing their abilities, skills and competences, or by modifying the occupation, or the environment to better support their occupational engagement (WFOT, 2010; Yerxa et al., 1989).

By having a focus on health promotion, occupational therapists often receive education within biomedicine and/or health sciences, combining this knowledge with education in social behavioral, psychosocial and occupational science (WFOT, 2010). This positioning within health sciences education and health promotion has allowed occupational therapists to work with people across the lifespan, predominantly focusing on those who have an impairment of body structure or function owing to a health condition.

Consequently, occupational therapy is largely practiced in health-related and/or rehabilitation centers and hospitals, as well as schools, workplaces, long-term care facilities, and community settings where participation in occupations may be restricted by physical, affective or cognitive abilities of the individual or the characteristics of the environment (WFOT, 2010).

Nevertheless, the field of practice of occupational therapy is expanding to include people that are socially excluded and or have a restricted participation in society because of their membership in social or cultural minority groups (WFOT, 2010). For this purpose,

authors have argued for attending to the social responsibility of occupational therapy to develop understandings of occupation that take into consideration social categories (e.g. age, gender, race, ethnicity, disability) that can be constructed as a ‘difference’, restricting some groups’ rights to occupation (Kronenberg & Pollard, 2005, 2006; Pollard, Sakellariou, & Kronenberg, 2008). Further, several examinations of the concept of occupation have been undertaken to expand the notion of occupation beyond its social function to include political notions of having choice, access and rights (Galheigo, 2011; Hammell, 2008; Wilcock & Townsend, 2000; 2009). This social and political awareness has allowed occupational therapists to explore the political nature of occupation, that is, occupation as a site embedded within power differentials in which some groups are prevented from engaging in certain occupations, while others can benefit from their access to them (e.g. education, employment) (Pollard & Sakellariou, 2012, 2014).

Although it seems that occupational therapy only recently has begun to grapple with ideas regarding the political nature of occupation, this critical turn has promoted examinations of the assumptions underpinning occupational therapy to mobilize efforts that take up the profession’s social responsibility to social justice and human rights (Guajardo, Kronenberg, & Ramugondo, 2015; Pollard & Sakellariou, 2012).

1.3.2 Occupational science

Occupational science, or the study of occupation was introduced in the late 1980s and early 1990s as an emerging discipline with the potential to support occupational therapy practice and to contribute new knowledge to society (Yerxa et al., 1989; Yerxa, 1993). Since its foundation, occupational science has focused on understanding the form, function, and meaning of occupation, and the potential of occupation to influence people’s health and well-being (CAOT, 2008; Yerxa et al., 1989).

Originating in the values of occupational therapy, occupational science has generally been situated within the field of health sciences. However, occupational scientists have articulated a remarkable desire to address global population inequities and improve the lives of marginalized individuals and groups, acknowledging that the historical predominance of an individualistic and positivist/post-positivist frame within health

fields do not adequately address the root causes of injustices (Galheigo, 2011; Hocking, 2012; Laliberte Rudman, 2015; Magalhães, 2012; Malfitano, Lopes, Magalhães & Townsend, 2014). This increasing focus on social justice in occupational science over the past fifteen years echoes the calls for work toward a more just society across other health related disciplines such as nursing (Kagan, Smith & Chinn, 2014; Reimer-Kirkham & Browne, 2006) and counseling psychology (Toporek, Gerstein, Fouad, Roysircar, & Israel, 2006; Vera & Speight, 2003).

In search of new approaches to better understanding the relationships between social inequities and occupation, occupational scientists have increasingly drawn on critical theoretical perspectives (Whiteford & Hocking, 2012). As an example of this incorporation, Njelesani and colleagues (2013) propose a critical occupational approach to enhance understanding of how power is (re)produced when engaging in occupation; who controls occupation, how an occupation is chosen and the context in which it is (re)produced. Reflecting further on the use of critical perspectives in occupational science, it can be said that such work has pushed the occupational agenda to go deeper than the debates over knowledge generation, to challenge the relevance and role of occupational science in society (Laliberte Rudman et al., 2008; Frank, 2012). Although this critical movement has been met by some resistance, partly attributed to the persistence of postpositivist epistemological roots (Magalhães, 2012), it seems that there continues to be a pressing need for pushing the discipline towards epistemological and methodological spaces that can support inquiry that is political and transformative.

1.3.3 Occupation

The term occupation is derived from the Latin root “occupatio” meaning “to seize or take possession” (Yerxa et al., 1989, p.5). Although there is no consensus regarding a definition of occupation, and its usage is diverse among professionals in English and non-English speaking countries (Magalhães & Galheigo, 2010; Pollard & Sakellariou, 2012), occupation is often described as “the everyday activities that people do as individuals, in families and with communities to occupy time and bring meaning and purpose to life. Occupations include things people need to, want to and are expected to do” (WFOT, 2010). Accordingly, engaging in occupations or activities of everyday life has historically

been framed within occupational science and therapy as a process that convey action, anticipation, and taking control (Kiepek, Phelan, & Magalhães, 2014). Based on this definition, the study and practice of occupation has predominantly been focused on how occupation enables humans to organize their time and resources, take control over their environment, and contribute to the social and economic fabric of their communities (Townsend & Polatajko, 2007). In addition, the ‘active’ assumption underlying occupation has framed this term as self-initiated and goal-directed (i.e. purposeful) (Yerxa et al., 1989) which in turn has promoted the notion that people can shape their own future, become masters of their environment, and decide and choose in which occupation they want or not to engage (Kantartzis & Molineux, 2011).

Occupation has also historically been associated to the belief that humans can enhance their own health, well-being and perception of their quality of life through action (Hammell, 2009). Based on this belief, occupational therapy has tended to take a ‘therapeutic’ perspective of occupation (Pierce, 2009), focusing on enabling people’s engagement in occupations that allow them to look after themselves (self-care), enjoy life (leisure) and be economically self-sufficient (productivity) (Kielhofner, 2002; Townsend & Polatajko, 2007). In turn, occupational science has focused on providing evidence for the role of occupational therapy to enhance health, supporting the positioning of the profession within biomedicine and health systems (Kiepek et al., 2014).

More recently, authors have increasingly begun to integrate critical theoretical perspectives to examine the notions underlying occupation. As a result of these examinations, several authors have raised concerns regarding the dominance of individualistic notions underlying occupation and its effect on the study and practice of occupation (e.g. Dickie, Cutchin, & Humphry, 2006; Hocking, 2000, 2012; Laliberte Rudman, 2013). These examinations have also promoted understandings of occupations that move beyond a notion of occupation as solely the product of human action to attend to the socio-political, economic and cultural factors that shape individuals and groups’ experiences of occupation. These understandings have increased awareness regarding the diverse ways that individuals and groups perform as well as engage in occupations, which may or may not be consistent with how others view or perform the same occupation

(Pollard & Sakellariou, 2012). As such, these differences have been related to different social expectations and dominant ways of doing that dismiss or marginalize other occupational preferences and ways of carrying out occupation (Kiepek et al., 2014).

The above-mentioned assumptions are consistent with my view of occupation as shaped within particular contextual forces, ideologies and social relations of power that give privilege to some groups while marginalizing others (Galvaan, 2012; Laliberte Rudman, 2013, 2014). This understanding of occupation is also congruent with the critical stance adopted in this thesis, which supports the emancipatory intents of scholars attempting to reconceptualize occupation as more than what people do to organize their time, but as a means for promoting social transformation and justice (Frank, 2012; Sakellariou & Pollard, 2017)

1.3.4 Social transformation

The concept of social transformation has increasingly been used in the areas of social science and critical qualitative inquiry to call for ways to respond to the needs of the least advantaged groups in society by embracing social justice as both a political and ethical commitment (Denzin & Giardina, 2009; Kincheloe & McLaren, 2003). At the same time, social transformation is often associated with research and practice addressing forces of domination that affect people's lives and the worldviews of diverse people (Kincheloe & McLaren, 2003). In this context, social transformation has become a major rationale for rejecting the common tendency to accept historically mediated structures as immutable by questioning the assumptions that reinforce the privilege of some groups while marginalizing the needs of others. This rationale has been forwarded as fundamental for the purpose of social transformation that demands the identification of power differentials in society to expose the structures that support them (Sayer, 2009).

Further, social transformation is understood as inherently emancipatory, that is, having the identification and reduction of oppression and marginalization as a central moral purpose (Santos, 2014). However, this moral purpose is often confused with a matter of identifying suffering/injustices without acting against them (Canella & Lincoln, 2009; Sayer, 2009). For this reason, it is essential to notice that social transformation, aligned

with a critical stance, not only seeks to point out the causes of oppression, but also to reveal hidden possibilities that can promote justice (Sayer, 2009).

1.3.5 Occupation-based social transformative practices

Although there is no one definition of occupation-based work that aims to contribute to social change, much of the work addressing the relationships between occupation, power, and justice has implicitly or explicitly been defined as social transformative within the occupation-based literature (e.g. Frank & Zemke, 2008; Laliberte Rudman, 2015; Sakellariou & Pollard, 2017; Townsend, 1997; Watson & Swartz, 2004). Based on this work, it can be inferred that occupation-based social transformative practices have as a common feature the integration of critical theoretical perspectives to consider how occupation can be used as a means for promoting social justice and change.

Further, occupation-based social transformative practices seem to express a commitment to social perspectives of occupation, as opposite to individualistic and ahistorical views that frame occupation as dissociated from its contextual influences (Guajardo, et al., 2015; Hocking, 2009). This means that instead of focusing on the abilities of individuals to engage in occupation, these practices promote questioning of the socioeconomic, cultural and political factors that restrict access to or coerce engagement in occupations (Hocking, 2009). In addition, these practices seem to share a commitment to acting alongside people and communities in situations of social exclusion (Guajardo et al., 2015). The pursuit of positioning these practices in close relationship with communities can be associated to their stated desire to generate ruptures with traditional forms of practice that maintain instead of transform the existing social order (Sakellariou & Pollard, 2017). As such, these practices seem to seek to identify, problematize, and question practices and assumptions to avoid perpetuating existing injustices. Lastly, what seems to be another key feature of these practices is their collective desire to move beyond dominant occupational therapy and science frames to allow the emergence of other types of practices and knowledges aligned with critically-informed notions of social transformation.

1.3.6 Occupational justice and Social justice

The incorporation of critical theoretical perspectives in occupational therapy and science has been influenced by and influenced the emergence of concepts that support the reconceptualization of occupation as a situated political phenomenon (Galvaan, 2015; Laliberte Rudman & Huot, 2013). One early concept that emerged from the work of scholars sharing a vision of ‘an occupational just world’, where individuals and populations could flourish as equal citizens, is occupational justice (Townsend, & Wilcock, 2004; Wilcock, & Townsend, 2000). Occupational justice has broadly been defined as “the right of every individual to be able to meet basic needs and to have equal opportunities and life chances to reach toward her or his potential but specific to the individual’s engagement in diverse and meaningful occupation” (Wilcock & Townsend, 2009, p. 193). Expanding beyond consideration of individuals, occupational injustice has also been proposed as situations in which peoples’ rights to engage in meaningful and enriching occupations are violated, such as when people are excluded from participating in occupations or forced into degrading and life-threatening occupations (Townsend & Wilcock, 2004; Whiteford, 2000).

Although the concept of occupational justice has contributed to the increasing social and political awareness within occupational science and therapy, it has been challenged and critiqued for its lack of conceptual clarity (Bailliard, 2016; Durocher, Gibson, & Rappolt, 2014). Along these lines, occupational justice has been taken up in multiple ways within the literature of occupational science and therapy, sometimes in ways that do not align with the reconceptualization of occupation as a situated phenomenon (Durocher, Gibson, & Rappolt, 2014). Thus, given the multiple meanings that occupational justice can evoke, it is important to define how I employ this term. In this dissertation, occupational justice is understood as a conceptual frame that has attempted to shift emphasis toward social relations and socio-political conditions that shape individuals and communities’ possibilities for engaging in occupations (Stadnyk, Townsend, & Wilcock, 2010; Townsend & Wilcock, 2004). As such, it is inferred that occupational injustices occur when people’s occupational rights are restricted by contextual forces that extend beyond personal control and choice.

Further, in this dissertation the appearance and continued evolution of the concept of occupational justice is related to increasing attention to social justice discourses across a variety of health-related fields (Kagan, Smith & Chinn, 2014; Reimer-Kirkham & Browne, 2006; Vera & Speight, 2003). These discourses seek to take up particular disciplinary and professional lenses to expose, illuminate and/or transform issues of injustice such as poverty and marginalization as disturbing manifestations of differences in power relations in society (Browne & Reimer-Kirkham, 2014). For instance, Wilcock and Townsend (2000) refer to occupational justice as a particular expression of social justice that instead of drawing attention to the distribution of material wealth or the ways in which humans treat each other, addresses “what people do in their relationships and conditions for living” (p.84). As such, occupational justice takes up an occupational lens to focus on the broadest sense of what people do to develop their occupational potential or meet the occupational challenges of their communities (Wilcock & Townsend, 2000)

Social justice has also been introduced in the health-related literature as a philosophical perspective that traditionally has emphasized the dignity and sovereignty of the human person, and the importance of creating an inclusive society (Browne & Reimer-Kirkham, 2014; Hocking, 2017). While the exact nature and outcome of social justice has long been debated, and defined in diverse ways, there seems to be a shared belief that a just society is one in which all citizens are treated equitably, receiving a fair share of social resources (Robinson, 2016; Hocking, 2017). Nevertheless, in this dissertation, more than embracing a particular definition or theory, social justice is understood as “not susceptible to a single simple definition” (Anderson et al., 2009, p. 287) but rather as an ethical and moral compass that varies across people, places, and time, and that serves to guide reason and action (Hocking, 2017).

1.4 Situating this critical scholarship

Acknowledging the multiple positionalities and theoretical influences that researchers may bring to their research, I describe the influence of my positionalities and theoretical influences on this dissertation. For this reason, I open this section by providing a brief clarification on the language used in the different chapters. Next, I situate this thesis by describing my position as a researcher and the epistemological underpinnings that shape

this work. Finally, I present a detailed description of the content of the chapters included in this dissertation.

1.4.1 A clarification on language

As this thesis has been written in an integrated-article style, it is worth noting that the manuscripts were prepared for different journals and audiences, and therefore their language may vary. For example, at times the language used is more aligned with occupational science (chapter 2), occupational therapy (chapter 3 and 5), occupational science and therapy (chapter 6), and at other times it aligns more with language used within the fields of health sciences and critical qualitative inquiry (chapter 4). In addition, in the introduction and discussion chapters where I am the sole author, I have chosen to use singular pronouns, such as ‘I’ or ‘my’ to signal my role as lead investigator and demonstrate the personal nature of the ideas presented. In contrast, I use plural pronouns, such as ‘we’, ‘our’ and ‘the authors’ in those chapters where I am both the lead investigator and author, but in which my supervisor (chapters 2, 3, 4, 5, and 6), members of my thesis advisory committee (chapters 3 and 4) and participants (chapter 5) have contributed to crafting the work for publication in different ways (see co-authorship statement).

Further, as my thesis is situated within the critical paradigm, its evolving nature makes it difficult to use only one term to refer to the diverse theoretical approaches and positionalities encompassed within this paradigm. For example, in this thesis the critical paradigm is also referred to as the critical social paradigm, and critical perspectives/approaches are also referred to as critical theoretical perspectives and/or critical epistemological perspectives. These differences are partly due to the terms preferred by the intended audience of each manuscript (e.g. occupational therapists versus diverse health professionals and critical qualitative researchers), how the authors and critical theorists cited in the manuscripts use these terms, and discussions with my thesis advisory committee.

1.4.2 Situating myself as researcher: ‘There is no view from nowhere’

Since the conquest and early modern colonialism, there is a form of injustice that founds and pollutes all other forms of injustice that we have recognized in modernity [...] it is the cognitive injustice. There is no greater injustice than that, because it is the injustice among knowledge. It is the idea that there is only one valid knowledge, a perfect knowledge produced largely in the global North, which we call modern science. (Santos, 2011, p. 16)

Consistent with a critical stance (Guba & Lincoln, 1994), I believe that my values and lived experiences cannot, and should not, be separated from the research process. Rather, my values and experiences should be acknowledged as influencing my research interests, thesis topic, relationships with participants and the ways I view research and knowledge. Consequently, in this section, I begin by describing my background and how it has influenced my doctoral work and who I am as a researcher.

Being South American (Amerindian²), born in Chile during the military dictatorship (1973-1990) has influenced the way I view research, what constitutes valid knowledge and who decides what type of knowledge is valid. This is partly due to the way in which South America, and specifically Chile has been shaped by socio-political and historical processes in which people’s knowledge and views of reality were not only appropriated but also reformed to European/conquerors standards of scientific thought and reason (Tuhiwai Smith, 1999). Because of my background, I have been particularly interested in exploring how the notion of knowledge imposed by the conquerors through their long-lasting period of colonization seems to still be present today, even though the colonization of the Americas took place more than five hundred years ago. Developing this interest, I have been drawn to scholars such as Ngugi wa Thiong’o who calls this process of colonization of knowledge or positional superiority conferred to Eurocentric knowledge a “colonization of the mind” (cited in Tuhiwai Smith, 1999, p.59), and Santos

² According to Donghi (1993) Amerind or Amerindian refers collectively to the indigenous people of the Americas who lived in the Western hemisphere before European arrival to the continent.

who calls this process as “cognitive injustice” (Santos, 2014). Further, I have been also influenced by Freire’s work (1970), who argues that the knowledge superiority created by colonization regarding who has the capacity to reason divided southern societies, making people believe that the ideas coming from ‘outside’ are the only legitimate and valid ones. Thus, it could be said that my personal background has allowed me to experience and observe how the production of knowledge, and supremacy of specific forms of knowledge in South America over time has become, as much Eurocentric (nowadays also referred to as modern science and modern Western thinking and practice) as it was during the colonial cycle (e.g. reproduced in universities, research centers and scientific communities) (Santos, 2007).

Moreover, reflecting on my background as a South American occupational therapist, I identify myself with the international movement that calls for an examination and disturbance of the dominance of Eurocentric approaches within the profession (e.g. Guajardo, et al., 2015; Sakellariou & Pollard, 2017). In fact, I believe that I came to study the growing political awareness within occupational science and therapy and frame this thesis as supporting the development of occupation-based social transformative scholarship as a personal and professional attempt to claim other (Southern³) knowledges and practices. The fact that knowledge within occupational therapy and science has predominantly been based on Western⁴ values (i.e. associated to the ideology of middle-class, white, able-bodied and economically secure Westerners) (Kantartzis & Molineux, 2011) and unquestionably spread to the rest of the world, has prompted my interest to

³ South here is not referred to as a geographical South, but used as a metaphor. Santos (2011, 2014) uses this metaphor of South to refer to the systematic suffering caused by capitalism and colonialism as well as other forms that have supported them, for example, patriarchy. He argues that there is also a South that exists in the North, which previously was called the third or fourth world within world: the oppressed, marginalized Europe and North America. There is also a global North and South; local elites that benefit from global capitalism.

⁴ At this point I am not longer referring to Western as the imaginary line between ‘east’ and ‘west’ drawn in 1493 to divide the European powers and colonies (Tuhiwai Smith, 1999) rather I am referring to the current dominant system of education and research which is deeply rooted both in the philosophy of Ancient Greece and the Renaissance, favouring positivist, analytical and reductionist views.

examine the assumptions embedded in theories that have shaped the study and practice of occupation.

I believe that my background, as articulated above, has influenced my attempts to not only support processes of decolonizing occupation and the profession, but also to create spaces for context-situated and critically-informed ways of studying and thinking about occupation. For these reasons, my thesis draws on critical theorists such as Santos (2014) and Freire (1970), both aligned with social emancipatory and decolonizing intentions, to argue against the conscious or unconscious marginalization of practices and knowledges that have been developed at the margins of mainstream occupational therapy and science.

1.4.3 Reflecting on epistemological underpinnings

When I decided to return to school to pursue a doctoral degree, I was motivated by a strong personal interest in exploring critical epistemology and critical theoretical perspectives in relation to occupational science and therapy. Although I was not sure which topic or area I would work on, I came to realize that there were few critical scholars within occupational science and therapy involved in research related to the role of occupation in the (re)production or alleviation of social inequities. One of them is Prof. Debbie Laliberte Rudman, whose integration of critical perspectives to challenge the conceptualization of occupation and the role of occupational therapy and science in society (e.g. Laliberte Rudman et al., 2008; Laliberte Rudman, 2005, 2013) was essential for me when deciding to move to Canada and begin my doctoral studies under her supervision in 2013.

I believe that early on in my doctoral work I identified myself as working within the critical paradigm (Guba & Lincoln, 1994) because I strongly believe that there are multiple knowledges and worldviews, and that while some are privileged, others are marginalized or silenced (Santos, 2014). At the same time, based on my above-mentioned personal and professional background, I knew that I somehow would like to deconstruct the ways in which Eurocentric knowledge has been granted absolute priority in occupational science and therapy and integrate other experiences and knowledges for which Western traditions do not always make sense.

Consequently, positioning myself within the critical paradigm, allowed me to base my thesis on the assumption that knowledge and research are highly embedded within socio-political and historical contextual features, as well as shaped by personal and professional values and assumptions that influence the research process (Lincoln, Lynham, & Guba, 2011). I also believe that positioning myself and my work within the critical paradigm is congruent with the overall goal of my thesis which supports the examination of taken-for-granted notions of occupation and the relationships between occupation, power, and social structures.

As I proceeded with my first pieces of critical work, I began to notice that the exposure to different critical theories and perspectives shaped my work toward notions of social justice and social transformative scholarship. Although these notions align with a critical stance, the examination of ways in which occupation-based work could contribute to these goals was something that emerged organically within my work and that I initially did not expect to focus. Similarly, although I believe that the critical paradigm is the most fitting stance to position myself within, through my work I have been able to explore its drawbacks and strengths (chapter 3 and 4). This exploration has allowed me to view the critical paradigm as a continuum of positionalities which may not always enact social change (Cannella & Lincoln, 2009; Sayer 2009). Thus, while I situate myself within this continuum, I believe that my critical stance aligns more with those scholars attempting to move critical scholarship beyond deconstruction and identification of inequities, to confront injustices by enacting a notion of inquiry that supports and provides tools for social change (e.g. Cannella, et al., 2015; Kincheloe & McLaren, 2005; Sayer, 2009).

Finally, although it is sometimes difficult to articulate researchers' stance, this is essential in critical work (Fine, Weis, Wesson & Wong, 2003; Lather, 2004). As such, although it is still under the process of growth and development, I believe that the evolution of my critical stance is palpable throughout this thesis. I also believe that my engagement with critical theorists such as Santos (2014) and Freire (1970) reflects my process of expressing ideas more aligned with decolonizing intents which emerged at the mid-term and end of my doctoral process. As a result, this critical scholarship not only

demonstrates how each chapter builds on this thesis critical intents, but also my own process of exploring my critical stance and articulating it in diverse ways.

1.5 Plan of presentation

The doctoral dissertation consists of seven chapters which encompass conceptual, theoretical, methodological, practical, and reflexive thinking. Although each manuscript is intended to stand alone for publication, they all build upon each other, as they emerged in response to the issues and questions that surfaced in the previous manuscripts. This evolving and dynamic process allowed me to explore and gain in-depth understanding of the issues as they arose in each manuscript, while keeping the focus on the broader aim of the thesis. Consequently, each chapter contributes to the broader aim of supporting the growing political awareness and critical reflexivity within occupational science and therapy by informing further development of occupation-based social transformative scholarship. The content of each of these chapters will be described below.

In this chapter, I situate this critical scholarship within international calls related to both the need for expanding occupational therapy practice to the social realm, and for exploring the transformative potential of occupation to address global inequities. Further, I introduce the thesis as a whole, outlining the rationale, the purpose of this critical scholarship, and how each piece adds to the broader aim of the thesis (Figure 1). This chapter also provides information regarding my position as a researcher, and the epistemological underpinnings that shape this work as well as a brief clarification on the language used in the different chapters, defining several key terms that are used throughout this dissertation.

Chapter two introduces the first of five integrated manuscripts. This manuscript presents a critical interpretive synthesis that critically engages with the uptake of critical theoretical perspectives within occupational science. Further, this manuscript introduces the terms critical and critical research with the purpose of unpacking their use within the literature of occupational science. The findings of this analysis identify both internal and external examinations undertaken within the discipline that deconstruct taken-for-granted assumptions that have shaped the conceptualization of occupation and informed the study

of occupation. As such, this manuscript provides a rich description of the integration of critical perspectives in occupational science, as well as a historical view of trends and calls within this field. This manuscript also identifies a collective desire to expand beyond critical questioning to support social transformation through occupation, which then became the main focus of this thesis.

Chapter three and four emerged from my candidacy exam in which I examined the critical paradigm and transformative scholarship, exploring notions of science aligned with social justice goals and new ways of thinking and acting together with communities and groups in situations of oppression or marginalization. These chapters introduce the concept of critical reflexivity, transformative scholarship and critical epistemological assumptions which are a common thread throughout this dissertation. Consequently, chapters three and four outline key epistemological and theoretical foundations for this dissertation.

Specifically, chapter three presents a critical analysis of a contemporary approach that self-identify as aligned with transformative and social justice goals, providing theoretical arguments for attending to epistemology in relation to occupational justice. Chapter four expands these theoretical arguments to the field of critical qualitative inquiry and health sciences, providing a comprehensive critical analysis of two frameworks as examples of transformative scholarship that have distanced themselves from critical roots. Addressing these epistemological tensions, this manuscript supports the relevance of this thesis beyond the fields of occupational science and therapy.

Chapter five argues for the need to incorporate diverse epistemological and methodological approaches to promote social transformation. Based on this argument, this manuscript provides a comprehensive overview of a critical dialogical approach; a research methodological approach that serves as one valuable option for promoting processes of transformation, (re)invention and critique. This manuscript also describes two methods that can be used to enact this approach (i.e. critical dialogical interviews and critical reflexivity). Additionally, it introduces the concepts of dialogue and discourse aligned with a critical stance. Overall, chapter five provides in-depth description of the

epistemological underpinning of a critical dialogical approach, practical and ethical considerations, and examples based on the methodological decisions and processes enacted in a critical dialogical study that is presented in chapter six. Consequently, chapter five works in tandem with chapter six.

Chapter six presents a critical dialogical study that examines how occupation-based social transformative work is understood by individuals who are attempting to enact it, and how it is shaped by discourses and other contextual features that contradict or challenge the ideals underlying these practices. It is worth observing that this chapter focus on examining occupation-based social transformative practices, using the term ‘practices’ to align with the authors and participants calls to disrupt the idea of a standardized or universal practice in occupational therapy. This change in language also reflects the focus of this manuscript on the relationships between discourses that privilege or marginalize certain practices.

This chapter also introduces a critical discourse analysis to deconstruct points of contradiction or tension between such features and participants’ constructions and enactments of occupation-based social transformative practices. The findings of this study contribute to making visible the discourses and other contextual features that create tensions for social transformative processes, as well as point to ways that these may be negotiated in attempts to enact these practices. The limitations of this critical dialogical study, as well as directions for further research are also addressed in this chapter.

The final chapter, chapter seven, provides a synthesis of the findings and insights gained throughout the process of developing this dissertation. This chapter also outlines the implications of this critical scholarship for occupational science and therapy education, and research, as well as for other professions and critical qualitative inquiry. Additionally, directions for further research and steps are proposed. My personal reflections on the research process as a whole are presented.

Each of the chapters presented in this thesis, with the exception of chapter one and seven, has been written as independent papers for publication. Some of these papers are already published, in review, or will be submitted for publication in a peer-reviewed journal

following the completion of my doctoral degree. For a full description of manuscript topics and their current publication status, please see table 1. As such, it is worth noticing that there is some repetition across the chapters related to some of the main concepts introduced in this work (e.g. critical reflexivity, critical epistemological assumptions, and transformative scholarship).

Table 1

Manuscript publication status

Chapter Number	Manuscript Title	Journal	Status
1	Introduction	N/A	N/A
2	A critical interpretive synthesis of the uptake of critical perspectives in occupational science	Journal of Occupational Science	Published first online Dec. 2014
3	Illustrating the importance of critical epistemology to realize the promise of occupational justice	OTJR: Special Issue on Occupation and Justice	Published August 2016
4	Reclaiming the potential of Transformative scholarship to enable social justice	International Journal of Qualitative Methods	Published June 2017
5	Critical dialogical approach: a methodological direction for occupation-based social transformative work	Scandinavian Journal of Occupational Therapy	Submitted March 2017
6	Examining occupation-based social transformative work using a critical dialogical approach		Pending submission
7	Discussion	N/A	N/A

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Chapter 2

2 A critical interpretive synthesis of the uptake of critical perspectives in occupational science⁵

Occupational science is at a crucial moment of disciplinary development, characterized by critical reflexivity regarding its foundational assumptions and calls for a more critical and socially responsive discipline. Upon entering its third decade of formal existence, there has been increasing examination of the boundaries within which the discipline, and the type of knowledge it generates, has been shaped (Glover, 2009; Hocking, 2012; Kantartzis & Molineux, 2011; Molke, Laliberte Rudman, Polatajko, Wicks, & Townsend, 2004; Pierce et al., 2010). For instance, several authors have raised concerns regarding the dominance of an Anglophone and Eurocentric conceptualization of occupation, informed by ideas dominant in the Western world (Hocking, 2012; Kantartzis & Molineux, 2011, 2012; Whiteford & Hocking, 2012), pointing to the limits that this orientation imposes when trying to understand the diversity of ways occupation is understood and enacted worldwide.

In addition, a political awareness has emerged, characterized by increased attention to historical and social forces that extend beyond the individual and shape possibilities for people's engagement in occupations (Angell, 2012; Galvaan, 2012; Hocking, 2012; Laliberte Rudman, 2010; Townsend, 2012). In parallel, calls to address global inequities through the development of a more critical and socially responsive discipline have also materialized (Angell, 2012; Hocking, 2012; Laliberte Rudman, 2013). The necessity of such disciplinary development has involved scholars advocating an "emancipatory agenda" (Whiteford & Hocking, 2012, p. 3) of social reform in which the power of occupation is stressed in order to develop a politically engaged and socially transformative discipline. As summarized by Laliberte Rudman (2014), "there is a

⁵ A version of this chapter has been published: Farias, L., & Laliberte Rudman, D. (2016). A Critical Interpretive Synthesis of the Uptake of Critical Perspectives in Occupational Science. *Journal of Occupational Science*, 23(1), 33-50. doi:10.1080/14427591.2014.989893

growing number of voices - from diverse geographical locations - pointing occupational science in transformative directions” (pp. 3-4).

Much of the work addressing the boundaries of knowledge production, embracing a political awareness and calling for an emancipatory agenda has highlighted, implicitly or explicitly, the importance of drawing upon critical perspectives to ensure such efforts are open to diverse worldviews, avoid enacting colonial agendas, and attend to the role of occupation within the hegemonic social order. Given the multiplicity of meanings attached to the notion of ‘critical’ (Kincheloe, McLaren & Steinberg, 2011; Sayer, 2009), it is crucial to examine how critical approaches have been employed thus far in occupational science literature to ensure continuous reflexivity that “enables the possibility of a more socially responsive discipline which in turn is able to make robust and relevant contributions to societal reform, inclusion and participation” (Hocking & Whiteford, 2012, p. 4).

Addressing how critical approaches have been defined and employed thus far is also important as critical work is not simply about changing or expanding current theories. Rather, it is about re-examining the ontological biases, assumptions, values and ethics that underpin a discipline, and re-thinking what may be taken-for-granted (Hocking & Whiteford, 2012; Laliberte Rudman, 2014; Laliberte Rudman et al., 2008). Illustrating this point, Frank (2011) argued that in order to move occupational science scholarship toward ethical, political and moral commitments, occupational scientists need to reassess and confront ethical, moral, political and theoretical foundational assumptions, going deeper than the often stalemated debates over the legitimacy of basic versus applied science. Thus, problematization of the standpoints being taken in the published critical work in occupational science, which considers the existential elements of such claims and raises awareness of underlying assumptions (Alvesson & Sandberg, 2011, 2013), will contribute to this overall reassessment of the moral philosophy and ethical stances within the discipline. Citing Foucault (1985), problematization is first and foremost an “endeavour to know how and to what extent it might be possible to think differently, instead of what is already known” (p. 9). From this standpoint, the intent of this work is

to invite more scholars to examine knowledge as an object of scrutiny itself, in order to foster new viewpoints, reflection and action.

Before moving on to the description of this study's methodology and methods, we situate our work by defining how we are using the terms critical and critical research. We intend to clarify these terms for the purpose of un-packing their use within the literature of occupational science. In doing so, we do not intend to diminish our colleagues' work or intentions, rather, we believe that our examination will contribute to the collective effort to develop a discipline that aims to address social change by being critical, radical and praxis oriented.

2.1 Defining Critical

The word critical has its origins in the idea of critique, that is, the process that seeks to uncover what appears as common sense understandings, how they have come to be accepted and their role in the maintenance of unequal power relations, with the overall goal of contributing to the struggle for radical social change (Jørgensen & Phillips, 2002). The term critique is often related to the work of Immanuel Kant and Karl Marx. Indeed, many of Marx's writings are titled 'a critique of' capital, political economy, and so on. Marx explicitly developed the notion of the critique of ideology, which he distinguished from a critique of knowledge (Lichtman, 1993). Ideology, or common sense, is understood by Marx as 'partial knowledge', because it is incomplete, not seen for what it is but taken to represent the way things really are, and serves the interests of one group (Amatrudo, 2009; Crotty, 2010; Sprinzak, 1999). Therefore, in the Marxist sense, since knowledge is always partial or incomplete it works in the interest of certain groups of the society. In turn, the role of science is to examine the relations of power that generate these social differences and to expose the structures that support them. Thus, critical science involves looking behind the appearances of the world as it is taken to be to reveal the hidden mechanisms of social inequality, thereby contributing to the liberation of oppressed groups.

More broadly, the term critical is associated with multiple critical theories, pointing out its many sources as well as its always changing and evolving nature (Denzin & Lincoln,

2005; Kincheloe & McLaren, 2005). Critical work is conceived by some contemporary authors as an over-arching term that encompasses a range of perspectives such as Marxism, the work of the members of the Frankfurt school, post-colonialism, radical feminism, queer theory, and governmentality (Carpenter & Suto, 2008; Sayer, 2009). Thus, for the purpose of this study the term critical denotes a broad and evolving group of theoretical approaches, rather than a single overarching approach. Key aspects of critical work, that we have identified, include its commitment to questioning the hidden assumptions and purposes of competing theories and existing forms of practice, and responding to situations of oppression and injustice by giving rise to new possibilities. As such, critical work is concerned not merely with how things are, but how they could and should be (Cannella & Lincoln, 2011; Sayer, 2009).

2.2 What is critical research?

Critical research is also not exclusive to any clearly defined category. Broadly, the term encompasses a range of research approaches that aim to challenge taken-for-granted norms, structures and practices, based on the assumption that there are power relations in society that simultaneously create privilege and disadvantage. It is also commonly assumed that a critique of such relations can reformulate normative perspectives and advance possibilities for social change (Jørgensen & Phillips, 2002; Kincheloe & McLaren, 2003).

Authors such as Cannella and Lincoln (2009) employ the term critical perspectives to embrace the many intellectual sources of critical research. They identify two foundational questions in this type of research: Who/what is helped/privileged/legitimated and Who/what is harmed/opposed/disqualified? (2009, p. 54). On the basis of these questions, it can be said that there are two basic assumptions in any approach that aims to be critical: there are groups in society that construct and perpetuate their own power by disempowering others, and there are social structures that accept or even collaborate in maintaining oppressive aspects of systems (Cannella & Lincoln, 2009). Furthering these assumptions, critical researchers need to assume that the type of knowledge being sought in critical research is far from being value-free or universally true. Since critical research conceives knowledge as partial, researchers need to take a political or moral stance within

their research and make their values, ideology and positionality clear, constantly reflecting on their own relation to the phenomenon under study (Fine, Weis, Wessen, & Wong, 2003; Lather, 2004).

In summarizing the discussion so far, we choose in this study to use the term critical research to encompass research that employs the approaches included under the umbrella terms critical social theory and critical perspectives. We also define, for the purpose of this study, this research as any type of research that aims to expose, illuminate and/or transform dilemmas and tensions related to social divisions and power differentials, which in turn are central concerns of social justice.

Although recent analyses of work in occupational science have pointed to several limitations in engaging with theories and methodologies that consider issues of power and justice (Laliberte Rudman, 2012; Magalhães, 2012), there appears to be growing attention to critical approaches. Thus, the purpose of this paper is to explore and examine how critical perspectives and research have been taken up in the occupational science literature thus far in order to discuss the possible benefits and challenges of adopting a critical standpoint, while moving forward with an emancipatory agenda.

2.3 Methodology and methods

Critical interpretive synthesis is an approach to synthesize large amounts of diverse qualitative data that treats literature itself as an object of inquiry, seeking to conduct a fundamental critique rather than critical appraisal (Barnett-Page & Thomas, 2009; Dixon-Woods et al., 2006; Flemming, 2010). This approach was designed by Dixon-Woods et al. (2006) to push beyond compiling and summarizing the literature in order to engage with the underlying assumptions that shape and inform a given field (Barnett-Page & Thomas, 2009; Heaton, Corden, & Parker, 2012).

This approach does not proceed as a linear process with discrete stages of literature searching, sampling, data extraction, critique and synthesis (Markoulakis & Kirsh, 2013). In contrast, it involves an “iterative, interactive, dynamic and recursive” process (Dixon-Woods et al., 2006, p. 9). However, for the purpose of describing the components

included within this critical interpretive synthesis, the stages of this process are presented as separate. Given that this analysis was on publicly available articles, ethics approval was not required.

2.3.1 Retrieving and mapping the literature

The method of literature searching followed Arksey and O'Malley's (2005) framework for conducting scoping studies. In line with Dixon-Woods et al. (2006), this method employs an organic process that aims to identify relevant material to provide a sampling frame, rather than focusing on highly structured relevance searching (Arksey & O'Malley, 2005; Levac, Colquhoun, & O'Brien, 2010; Mays, Roberts, & Popay, 2001). Within this study, this approach was also chosen as it was assumed that relevant articles would be diverse in focus and design (Anderson, Allen, Peckham, & Goodwin, 2008).

Two search strategies were used: 1) a combination of abstract, title and key word screening and hand searching, and 2) full-text reading. The first strategy was to review and screen the abstracts, titles and key words of all 561 articles available online in the Journal of Occupational Science between April 1996 and October 2013. In keeping with Arksey and O'Malley's (2005) purpose of maintaining a wide approach to generate breadth of coverage, no methodological limitations were applied. In order to be included, the article had to meet one of the following criteria:

- a) The article is *explicitly* defined as critical research or explicitly employs critical perspectives within its theoretical framework, e.g. the authors situate their work within a critical movement or clearly identify their work as a critical study, analysis, etc.
- b) The article has an *implicit* intention to be critical which is not clearly stated, but embedded in the language or purpose of the study by the use of words such as ideology, hegemony, power, or its purpose is to challenge, uncover, reveal, etc.

The search of documents *explicitly* defined as critical was conducted by screening abstracts, titles and key words using the following electronic search terms: *critical*, *critical theory*, *critical perspective*, *critical analysis* and *critical approach*. The search for

articles that appear to have an *implicit* critical intention was conducted using hand search, scanning the journal's content page-by-page, a more organic process of interpretive analysis of the authors' purpose. Based on the authors' understanding of critical work, articles were scanned seeking to answer the following questions: Do the authors intend to question the hidden assumptions of existing forms of practices? Do the authors present a critical approach that explains and supports their rationale? Do the authors aim to change any institutional arrangement, mechanism of injustice or fixed system of thought? In total, the first search strategy; a combination of abstract, title and key word screening and hand search, yielded a total of 40 articles.

The second strategy was to full-text read through the 40 articles searching mainly for the following aspects: the origins and development of critical perspectives in occupational science, how critical work has been carried out, and how it has pushed the discipline in certain directions. As the authors engaged more deeply with the process and came to a deeper understanding of the data, 13 articles were excluded because of their ambiguity. That is to say, they did not explicitly or implicitly carry out a critical approach throughout their article. Finally, a total of 27 Journal of Occupational Science articles were included in the critical interpretive synthesis (See Table 2 for a chronological list).

Table 2

Chronological list of the 27 articles included in the Critical Interpretive Synthesis

Author	Year	Title
Dickie, V.	1996	Craft production in Detroit: Spatial, temporal, and social relations of work in the home
Dickie, V., & Frank, G.	1996	Artisan occupations in the global economy: A conceptual framework
Frank, G.	1996	Crafts production and resistance to domination in the late 20th century.
Townsend, E.	1997	Occupation: Potential for personal and social transformation.
Jackson, J.	1998	Contemporary criticisms of role theory.
Jackson, J.	1998	Is there a place for role theory in occupational science?
Hugman, R.	1999	Ageing, occupation and social engagement: Towards a lively later life.
Whiteford, G.	2001	The occupational agenda of the future.

- Whiteford, G. 2003 Enhancing occupational opportunities in communities: Politics' third way and the concept of the enabling state.
- Laliberte Rudman, D. 2005 Understanding political influences on occupational possibilities: An analysis of newspaper constructions of retirement.
- Dickie, V., Cutchin, M. P., & Humphry, R. 2006 Occupation as transactional experience: A critique of individualism in occupational science
- Laliberte Rudman, D., Dennhardt, S., Fok, D., Huot, S., Molke, D., Park, A., & Zur, B. 2008 A vision for occupational science: Reflecting on our disciplinary culture.
- Hocking, C. 2009 The challenge of occupation: Describing the things people do.
- Laliberte Rudman, D., Huot, S., & Dennhardt, S. 2009 Shaping ideal places for retirement: Occupational possibilities within contemporary media.
- Molke, D. K. 2009 Outlining a critical ethos for historical work in occupational science and occupational therapy.
- Laliberte Rudman, D. 2010 Occupational terminology: Occupational possibilities.
- Asaba, E., & Jackson, J. 2011 Social ideologies embedded in everyday life: A narrative analysis about disability, identities, and occupation.
- Frank, G. 2011 The 2010 Ruth Zemke Lecture in Occupational Science: Occupational therapy/occupational science/occupational justice: Moral commitments and global assemblages.
- Kantartzis, S., & Molineux, M. 2011 The Influence of Western society's construction of a healthy daily life on the conceptualisation of occupation.
- Huot, S., Laliberte Rudman, D., Dodson, B., & Magalhães, L. 2012 Expanding policy-based conceptualizations of 'successful integration': Negotiating integration through occupation following international migration.
- Angell, A. M. 2012 Occupation-centered analysis of social difference: Contributions to a socially responsive occupational science.
- Townsend, E. 2012 The 2010 Townsend Polatajko Lectureship: Boundaries and bridges to adult mental health: Critical occupational and capabilities perspectives of justice.
- Pereira, R. B. 2012 Using critical policy analysis in occupational science research: Exploring Bacchi's methodology.
- Bailliard, A. 2013 Laying low: Fear and injustice for Latino migrants to Smalltown, USA.
- Huot, S. 2013 Francophone immigrant integration and neoliberal governance: The paradoxical role of community organizations.
- Laliberte Rudman, D. 2013 The 2012 Townsend Polatajko Lectureship: Enacting the critical potential of occupational science: Problematizing the 'individualizing of occupation'.
- Kiepek, N., Phelan, S. K., & Magalhães, L. 2013 Introducing a critical analysis of the figured world of occupation.
-

2.3.2 Developing a critical interpretive synthesis

The process of interpretive synthesis and critique began by detailed examination of each of the 27 papers, seeking to gradually identify recurring themes and developing critique. Each paper was critically examined as an object of scrutiny itself by each author separately and notes were compared afterwards. These notes were used by the first author to compile a summary mapping of each article in relation to its purpose, assumptions, theoretical influence, rationale for critical approach, and attention to internal, external and/or broader considerations. This process involved an iterative, inductive and constantly dialectic process between interpretation and reflexivity, integrating diverse findings and examining each article itself and in relation to the others, which led to the formation of initial article groupings. Reflexivity involved both individual note-writing on each author's starting assumptions related to questions such as what counts as critical and what sorts of critical work does she value, as well as collective reflexivity regarding these assumptions and values through discussion. These groupings were constantly compared and reviewed by the authors in order to develop themes reflecting how critical perspectives were taken up and employed, while maintaining consistency with the stated intent of the original studies and extending beyond them (Barnett-Page & Thomas, 2009; Dixon-Woods et al., 2006; Heaton et al., 2012).

2.4 Findings

The critical interpretive analysis involved the operationalisation of the notion of critical into synthetic constructs (Dixon-Woods et al., 2006). As a result, we identified the synthetic constructs of both the internal and external examinations undertaken within the discipline, the complex interplay between them, and the broader examinations and calls for becoming a critical discipline. We explore each synthetic construct below, naming them as 'turning the critical lens inward', 'turning the critical lens outward', and 'pushing for a broader agenda'.

2.4.1 Turning the critical lens inward: Deconstructing foundations and pushing boundaries

A series of articles, beginning in the late 1990s (e.g., Jackson 1998a, 1999b) and continuing into 2013, have taken up critical perspectives in order to question and challenge the foundational assumptions and taken-for-granted beliefs that have shaped and conceptualized occupation. This internal questioning has attempted to situate these core assumptions and beliefs, addressing the genesis, development and positioning of occupational science within particular geographical, professional and ideological contexts. In line with the broad definition of critical research adopted in this article, the critical intent of such work is often articulated as raising awareness of what has come to be taken-for-granted about occupation and how this has bounded the questions asked and the knowledge generated. A key underlying assumption appears to be that a critique of the taken-for-granted and consideration of how particular assumptions and beliefs have become dominant will create space for thinking about and studying occupation in more diverse ways. In turn, one of the dominant arguments is that space needs to be opened up to shift away from individualistic notions of occupation to consider its situated nature.

2.4.1.1 Uncovering taken-for-granted assumptions inherited from its foundation

Although numerous authors have recently conducted analyses aimed at uncovering, locating and critically considering taken-for-granted assumptions that have bounded knowledge production in occupational science (e.g., Frank, 2011; Kantartzis & Molineux, 2011; Kiepek, Phelan, & Magalhães, 2013), work examining boundaries within which the discipline, its model of science and the knowledge it generates has existed since the late 1990s. With this examination, scholars have revealed how values and normative ideals rooted in both the epistemological standpoint of occupational therapy and various aspects of the political, socio-cultural and economic context in which the discipline was formally named and has attempted to develop have shaped both its production of knowledge and its assumptions about the role of science.

An early example of explicit criticism of the internal epistemological limitations of occupational science is Townsend's (1997) critical analysis of the positivist notion of

occupation. Her critique focused on the categorization of occupation, locating the emphasis on the overreliance on positivist and empirical approaches to understanding occupation which has resulted in an objectification and classification of occupation into classes of work for economic production. In turn, she argued for the need to re-examine the implicit assumptions and ideals underlying occupation and how individuals should spend time and life. Such ideals, particularly aligned with Western positive values, have been shown to not only limit occupation to static categories driven by social organizations, but also to confer value and power on some occupations but not others.

Furthering that criticism, Hugman (1999) argued for an understanding of civil society that includes a recognition of contributions through occupations other than those that are strictly economic. In particular, he pointed out how dominant popular views of occupation, related to economic productivity, have perpetuated systemic discriminations and jeopardized the citizenship of people who are old, homeless, unemployed, retired, chronically ill or are immigrants.

Jackson's work (1998a, 1998b) explicitly criticized the normative ideals guiding the discipline since its foundation, particularly pointing to the promotion of concepts of normality which, in turn, support power relations within society. In her article, Jackson provocatively raised issues related to how assumptions underlying theories, inherited from occupational therapy or adopted from other disciplines, reify social ideologies into concrete realities. For example, according to Jackson, role theory, a theory incorporated into occupational therapy's behavioral frame of reference and uncritically inherited by occupational scientists, had provided an inadequate framework for the study of occupation given that it promotes normative standards of human behavior or proper ways to live, ignoring the sociopolitical forces that constrain and create opportunities for individual actions.

Furthering concern about the perpetuation of normative ideas of 'good' occupations through occupational science, several authors have more recently pointed out how occupation is predominantly focused on as good or healthy with a focus on ideal and expected ways to live, despite repeated acknowledgment of the limits of its construction

within Western and Anglophonic societies (Kantartzis & Molineux, 2011; Kiepek et al., 2013; Molke, 2009). Work aimed at raising awareness of the underlying assumptions of what constitutes a healthy life and good occupation has attempted to remind scholars that they are members of a minority world population, and that the beliefs and values attached to occupations and underpinning research have been significantly influenced by Western views of healthy and ideal everyday life. For example, Molke's (2009) critical outlining of ethos in occupational science revealed how the discipline has been routinely conceptualized within pervasive narratives, related to particular Western positive notions of progress, that have sought to fit individuals into systems, marginalizing those who disagree with the current order of things. Likewise, Kiepek and her colleagues (2013) aimed to demonstrate how values, assumptions and morals embedded in theories that have shaped the conceptualization of occupation can implicitly marginalize those who engage in occupations that are considered negative, unhealthy or deviant based on dominant Western ideology.

Based upon the critical analyses of the boundaries created through taken-for-granted assumptions and beliefs tied to Western and positivist notions of science, Western ideology, occupational therapy models and other socio-political factors, several authors have attempted to challenge the foci of study of the discipline. In particular, these criticisms have attempted to push beyond the individualistic perspective and narrow focus on categorization in relation to productivity. For instance, several authors have pointed to the need for research that generates knowledge about occupation as "situated" within social and political contexts (e.g. Dickie, Cutchin, & Humphry, 2006; Hocking, 2009; Laliberte Rudman, 2005, 2010).

2.4.1.2 Pushing boundaries by challenging the foci of occupational science

Particularly dominant directions have been to move the foci of occupational science studies beyond individual experiences of occupation, as a fundamental unity of study, to position occupation itself as an object of inquiry and to conceptualize occupation as a socially and politically situated phenomenon. This work has also demanded a shift in underlying assumptions about the nature of occupation that are consistent with critical

theoretical perspectives, for example, shifting away from an assumption that human beings are authors of their occupations towards an assumption that occupations are shaped through and within particular social, political, economic and other contextual forces.

As an example, Hocking (2009) proposed a new strand of scholarship for occupational science dedicated to generating knowledge of occupation itself, based on the argument that the majority of occupational science scholarship is founded on Western notions of independence and free choice, has centered on the human experience of occupation, and has attempted to understand the individual skills, knowledge and attitudes associated with performance. Within this article, Hocking articulated key directions for this strand of scholarship commensurate with critical foci, such as: placing occupation in relation to its contextual influences; actively seeking out and describing how cultural, gender-based, generational, socioeconomic, and other factors restrict access to occupations; and addressing whether engagement in occupations is voluntary or coerced and who profits from the occupation and who is marginalized.

Several authors, such as Dickie et al. (2006), Whiteford (2001, 2003) and Laliberte Rudman (2010, 2013), have pointed to the need for continued expansion of the study of occupation beyond an individualistic perspective. Although drawing on diverse theoretical foundations, this work takes up a critical intent by raising awareness of the failure to adequately address occupation as situated, that is, the ways in which occupation is shaped within, and contributes to the shaping of contextual factors. For example, Whiteford (2001, 2003) tied the need to extend the occupational research agenda beyond an individualistic perspective to focus on communities and the structural contexts within which they exist in order to generate knowledge and raise awareness of how sociopolitical processes, residing outside the control of the individual, predicate or exclude forms of occupational engagement. Dickie and her colleagues (2006) explicitly rejected the dichotomy of person-environment presented in early scholarship and its implicit assumption of free choice of engaging in occupations, thereby implicitly criticizing scholars for maintaining a simplistic and static view of occupation as a 'thing' residing within the individual. Although their call to adopt a transactional view did not

initially attend to issues of power and injustice, such concerns have been more recently raised by scholars employing a transactional approach in the study of occupation (Cutchin & Dickie, 2013). In turn, researchers who have moved into the spaces created by such internal questioning and the call to examine the situated nature of occupation have taken up critical perspectives to turn the critical lens outwards.

2.4.2 Turning the critical lens outwards: Situating occupation in relation to power and forefronting issues of inequity and injustice

Another prominent way that critical perspectives have thus far been taken up within occupational science scholarship has been to push beyond considering how occupation is shaped by environmental or contextual features, to consider how it is situated with relations of power. Commensurate with a key thread of critical research, the intent of such work is often positioned as questioning or deconstructing taken-for-granted beliefs, practices and norms about occupation that contribute to maintaining inequities and injustices. An underlying guiding assumption is that such questioning will serve to expose structures of power and domination that shape and perpetuate situations of oppression. In turn, it is assumed that such exposure can advance possibilities for social change. Within this work, the assumption that occupations are shaped through and within particular social, political, economic and other contextual forces continues to operate, but also extends into the assumption that occupation itself is inherently a political phenomenon. As a political phenomenon, occupation is conceptualized as imbued with social power and as a means to enact social power, and thus it is argued that the study of occupation can raise awareness of how social power operates to create both privilege and disadvantage (Angell, 2012; Laliberte Rudman, 2010).

2.4.2.1 Addressing the socio-political shaping of occupational injustices and occupational possibilities

For example, expanding upon Townsend's (1997) call for increased attention to contextual influences that shape environments and occupational injustices, Laliberte Rudman and colleagues (2005, 2009) employed governmentality theory and discourse analyses to deconstruct contemporary discourses of positive aging. Their aim was to

illustrate how the shaping of such discourses within power relations aligned with neoliberal rationality created both possibilities and boundaries for occupation for aging persons as retirees. In this research, discourses, as ways of writing and talking about a phenomenon, were examined. The findings highlight the ways in which the political context is connected to the shaping of everyday conduct in ways that create positive possibilities for particular aging individuals who can enact the ‘duty to age well’ while simultaneously marginalizing those who do not fit the idealized characteristics of the dominant political rationality. Out of this work the concept of occupational possibilities (Laliberte Rudman, 2005, 2010) arose. That concept fosters recognition that occupational opportunities are not equally distributed and points to the importance of questioning the ways and types of doing that are viewed as ideal, and are socially promoted through discursive and other means, for particular types of people within particular sociohistorical contexts.

Other scholars have also focused on the crucial influence of discourse, commensurate with an underlying assumption of many critical perspectives, that language and the shaping of truths through discursive means are key ways that social power is enacted (Cannella & Lincoln, 2009). For example, Asaba and Jackson (2011) aimed to highlight how discourses, as expressions of social ideologies, are intricately perpetuated in human action and occupation. In their article, they challenged scholars to become more aware of the ways social ideologies can be reinforced in typical daily occupations, influencing people’s occupational possibilities for citizenship and social participation. For example, they raised awareness of how certain ideologies and discourses regarding disability can hinder individuals’ self-presentation in everyday practices.

Similarly, Huot and her colleagues (2013, 2012) by explicitly challenging assumptions regarding successful integration embedded within Canadian governmental policy discourses, raised awareness of the structural barriers faced by immigrants when engaging in occupations. These studies problematized how successful integration is constructed within Canadian documents by pointing to a narrow and individualistic focus on productive occupations, and raised concerns regarding how this discourse substantially shapes immigrants’ occupational possibilities by bounding the mandate of support

services to occupations tied to engagement in the work force or preparation for such productivity. Also pointing to the need to analyze the sociopolitical impact of government policies on human occupation, Bailliard (2013) stressed the need for occupational science to critically engage in political arenas to highlight the unanticipated effects of governing policies on occupational participation, advocate against oppressive policies and inform policy makers of ramifications of their policies on people's occupations.

2.4.2.2 Occupation as a means of governing and maintaining the social order

Another common thread in work that has turned the critical lens outwards is seen in the work of authors such as Townsend (2012), Angell (2012) and Pereira (2013), who challenged scholars to critically analyze the ways occupation may be used as a means to enact social power and govern individuals and collectives. For example, Townsend (2012) explicitly took up a 'critical occupational perspective' to focus on institutional practices and historically shaped boundaries that persist within certain settings. Her work offers new insights on social issues and human rights such as the injustice of exclusion from everyday occupations of groups of adults marginalized through poverty, drug addiction, stigmatization, and abuse.

In similar ways, both Angell (2012) and Pereira (2013) argued that critical occupational lenses are required to investigate how government policies and the social order can be created and reproduced through occupation, thus perpetuating marginalization, oppression and occupational injustice. For example, Angell (2012) explored the role of occupation in perpetuating the hegemonic social order along axes of difference based on gender, race and class. In her occupation-centered analysis of social difference, she examined how the social order is continually constructed, maintained, resisted and/or altered through what people do and do not do, and also avoid or deny doing, which is regulated by social structures that determine who should or should not participate in certain occupations.

In this literature, socially constructed differences such as age, gender, race, class and disability have come to the forefront, as occupational scientists have increasingly paid

attention to how the hegemonic social order, expressed in culture, ideology and social organization, governs occupational participation (e.g. Angell, 2012; Asaba & Jackson, 2011; Laliberte Rudman, 2005, 2010; Laliberte Rudman et al., 2009). This shift in theoretical lenses has increased awareness of taken-for-granted exclusionary social practices, and recognized the influence of power and the social order on the shaping of occupational opportunities. In that way, this work has pushed the agenda to go deeper than the debates over knowledge generation, challenging the expectations of scholars regarding the role of occupational science in society and the type of science that occupational science is or should be (e.g. Frank, 2011; Laliberte Rudman et al., 2008).

2.4.3 Pushing for a broader agenda: Expanding beyond knowledge generation and critical questioning to transformation

Beside the ways in which critical lenses have been employed to question the discipline's core assumptions and deconstruct the relation between occupation, power and the social order, scholars have taken up critical perspectives to question and re-vision the broader role of occupational science in addressing social issues in practice, research and scholarship. For example, this work has questioned the seeming dominance of positivist/post-positivist notions of science, the discipline's ethical, political and moral standpoint, and its limits in addressing issues related to power and justice (e.g. Angell, 2012; Frank, 2011; Laliberte Rudman, 2013; Townsend, 2012). In doing so, scholars have attempted to not only open up space for thinking about occupation as a site of reproduction and maintenance of unequal power relations, but also as a means of resistance and social transformation. A key underlying assumption of such work appears to be that a critique of the inherited notions of positivist science as a value-free and objective enterprise, solely concerned with knowledge generation, is necessary in order to create space for critical and transformative notions of science. In turn, it is assumed that such space will facilitate new ways of thinking and acting in relation to occupational inequities and injustices within local and global contexts.

2.4.3.1 Occupation as a site of resistance and political action

A number of early publications forwarded the notion of occupation as a site for political action and social change (e.g. Dickie, 1996; Dickie & Frank, 1996; Frank, 1996; Townsend, 1997). Although this notion seems to have been submerged for a period of time, the recent questioning of the roots of the discipline's moral standpoint and philosophy has facilitated the reemergence of this notion. Moreover, the critical questioning of the discipline's early roots has moved occupational science from normative and individualistic perspectives to the current discourse of occupational justice, drawing on early roots that stressed the "political" function of occupation enacted under conditions of threat to survival and resistance to systems of political and economic domination.

An early example is Dickie and Frank's work (1996), which stressed the power of occupation as a means for expression and resistance against oppression. In this article, the authors provided a context for the study of occupation embedded in the world's political economy, suggesting that occupational scientists should address the dynamics of power and resistance. Furthering this work, Frank (1996) challenged the dominant definition of occupation as chunks of daily activity that can be named in the lexicon of the culture, raising the concern: "what happens when the lexicon of the culture is contested?" (p. 56). Frank provided examples of powerful ways in which the meaning of traditional occupations, affirmed by the dominant system, had been mobilized as a means of resistance and political expression against oppression.

Although work examining occupation as a form of resistance and political action has highlighted the role of occupation in social transformation since the mid-1990s, there recently appears to be growing attention to how to enact this long-standing call to address social change through occupation. Much of this contemporary work has focused on pushing the occupational agenda towards a critical discipline with responsibility to social justice and human rights, intentionally or unintentionally enacting early notions of occupation as a means for social transformation, empowerment and development (e.g. Frank, 1996; Townsend, 1997; Whiteford, 2001).

2.4.3.2 Supporting social transformation through occupation: Occupation itself as a vehicle for transformation

As outlined in the introduction, a key aspect of critical work involves a commitment to respond to situations of oppression by giving rise to new possibilities for social change. In line with this broad definition, the early work of Townsend (1997) argued for the need to move away from positivist notions of occupation to focus on its potential for personal and social transformation. In her article, Townsend (1997) critically analyzed the ways in which education, health, welfare and other institutions have shaped occupation, neglecting its transformative potential to enable humans to develop as individuals and members of society. Specifically, she pointed to the potential and importance of recapturing the enlightening, emancipatory, empowering or other transformative potential of occupation, referring to this potential as “the opportunities for humans to choose and engage in occupation for the purposes of directing and changing either personal or social aspects of life, with the aim of realizing dreams and goals” (p. 20). In this way, the notion of ‘transformative potential of occupation’ created new possibilities for thinking about, studying and promoting occupation as an active process through which people experience and organize power, thereby enabling individuals to change aspects of their life.

Furthering this notion of occupation as a vehicle for social transformation, scholars such as Frank (2011) and Laliberte Rudman and colleagues (2008, 2012) have more recently focused on identifying and discussing questions to push the development of occupational science towards a more relevant discipline to academia, policy, and the general public. For example, Laliberte Rudman and colleagues (2008) proposed a vision for occupational science, hoping to move the discipline towards a critical, reflexive and socially responsive discipline that would not only engage in knowledge generation about social transformation, but also take action. Similarly, Frank (2011) raised questions regarding the role of occupational science in society, explicitly calling scholars to take the next step by putting into practice the discipline’s obligation and moral commitment to address moral and political questions related to social justice, humanitarianism and human rights.

2.5 Discussion

I started this chapter stating that occupational science is at a crucial moment in its development. A substantial body of knowledge based in internal critique has identified key boundaries, within which the discipline has operated. Others have employed critical perspectives to look outwards, attempting to move the occupational agenda into socio-political realms. Scholars now appear to be grappling with questions regarding how to take up the very early call to attend to the transformative potential of occupation, and how best to address the occupational injustices and inequities that are being deconstructed and critiqued.

Prior to discussing the implications of this analysis, we acknowledge its boundaries. Sampling was confined to articles published within the *Journal of Occupational Science*. Thus, publications addressing critical occupational science, such as the recent edited book by Whiteford and Hocking (2012), or the transformative potential of occupation (for example, Galheigo, 2011; Pollard, Sakellariou, & Kronenberg, 2009) in other venues have not been included as data.

Sayer (2009) and Denzin and Giardina (2009) described how critical social science has become increasingly cautious and timid in its critique over the last 3 decades. In their reflections on critical social science, there is a notion that critical scholarship tends to emerge from an enlarged motivation to contribute to the liberation of the oppressed through critical work, to make things more 'just', but often fails to translate this work to enhance social justice. Parallel to this discussion within critical social science, it seems that the same questioning is also surfacing within occupational science.

In an attempt to contribute to the efforts that seek to develop a critical and socially responsive discipline, we present a discussion regarding the implications of the findings of this critical interpretive review, summarizing them in critical turns: critical turn inwards, critical turn outwards and the broader turn towards transformative approaches. In particular, we situate the discipline as entering into the critical turn towards transformative approaches: a moment in its history with a great potential to embrace its transformative potential and become praxis-oriented.

The critical turn inwards is visible in the body of work in occupational science that has identified internal boundaries within the discipline since the late 1990s, focusing on uncovering the hidden and unconsidered ideas that have shaped knowledge production and practices, and deepened reflexivity (e.g. Frank, 2011; Hocking, 2009; Hugman, 1999; Jackson 1998a, 1998b; Kantartzis & Molineux, 2011; Kiepek et al., 2013; Molke, 2009; Townsend, 1997). Although this type of turning inwards represents an important part of the critical process of any discipline, it does not necessary lead to any visibly transformative effect on social justice. Instead, it implies a movement “away from the object or phenomena of critical attention, to the ways of thinking available to the researcher him/herself” (Sayer, 2009, p. 779). In this way, this shift of focus has the danger of converting critique into a sort of ‘navel-gazing’ that increases the risk of ethnocentrism, overlooking the differences and variety of cultures and circumstances within which occupation is enacted. Thus, while such internal vigilance and critique is beneficial to ensure researcher awareness of what is guiding their work, researchers that aim to critically engage in social and political arena need to negotiate this ‘swamp’ of interminable self-analysis to avoid falling into the infinite regress of excessive self-analysis and deconstructions (Finlay, 2002; Sayer, 2009).

Similarly, the critical turn outwards is manifested in the work that has expanded the critique of the discipline by looking outside the researcher him/herself and repositioning the focus of critical attention to occupation, enhancing understanding of its situatedness and challenging its role in creating and maintaining social inequities (e.g. Angell, 2012; Asaba & Jackson, 2011; Bailliard, 2013; Huot, 2013; Huot et al., 2012; Laliberte Rudman, 2005, 2010; Laliberte Rudman et al., 2009; Townsend, 2012). At one level, this work again represents a valuable contribution to the growing awareness in occupational science regarding the cultural and sociohistorical differences that shape occupation, opening up new types of spaces for thinking about occupation. However, these critiques outwards are not without limitations. Although, this work exposes oppressive practices and structures, it is still not sufficient to advance an emancipatory agenda. Thus, while exposing structures and practices is fundamental, this work can limit itself to the identification of inequities and injustices without acting against them (Canella & Lincoln, 2009; Sayer, 2009).

The idea of critique is described in the introduction of this article as the process that seeks to uncover what appears as common sense, with the overall goal of contributing to the struggle for radical social change (Jørgensen & Phillips, 2002). That means that critical work or critique should be underpinned by an orientation towards emancipation, thereby seeking change and social transformation as its main end and goal (Denzin & Giardina, 2009; Sayer, 2009). As articulated by Kincheloe and colleagues (2011),

Inquiry that aspires to the name ‘critical’ must be connected to an attempt to confront the injustices of a particular society or public sphere within the society. Research becomes a transformative endeavor unembarrassed by the label ‘political’ and unafraid to consummate a relationship with emancipatory consciousness. (p. 164)

Thus, not surprisingly, within the current moment of occupational science, several authors have pointed to the need to stop ‘turning around in circles’, calling for aligning theory and practice by taking an activist stance and assuming our social responsibility to the communities with whom we engage (Frank, 2011; Hocking, 2012; Magalhães, 2012). As noted by Frank (2011) and Laliberte Rudman (2014) this requires a clarification of what is meant by transformative scholarship, as well as an articulation of its guiding moral basis.

This current demand for taking up the discipline’s ethical, social and moral commitments is linked here to the entering of the discipline into a critical turn towards transformative approaches, so far characterized by calls for a more critical and socially responsive discipline (Angell, 2012; Laliberte Rudman 2013; Whiteford & Hocking, 2012), and enacting politically-informed transformative approaches (Laliberte Rudman, 2014). Although examples of the critical turn inwards and outwards appeared to exist across the time frame reviewed in this paper, this turn towards transformative approaches seems to have had its origins in the mid-1990s with scholars stressing the potential of occupation for social transformation (e.g. Dickie, 1996; Dickie & Frank, 1996; Frank, 1996; Townsend, 1997; Whiteford, 2001). At present, there appears to be a resurgence of these earlier calls to view, and employ, occupation as a means for social transformation,

empowerment and justice (e.g. Angell, 2012; Laliberte Rudman, 2013; Laliberte Rudman et al., 2008; Townsend, 2012). The resurgence of this early call for social change through occupation, made us reflect on why we are coming back to this call at this moment of time? Perhaps, the body of work turning inward and outward has opened up spaces to see the discipline and occupation differently, allowing us to examine diverse ways to take up these earlier calls?

The work within this turn towards transformative approaches has pushed the occupational agenda, not without debate and tensions within the discipline, to the point where a scholarly dialogue is required regarding the types of changes and values that the discipline needs to embrace, or is willing to create space for, within the diversity of scholarship of occupation that can occur within it, if there is to be further movement towards transformative ways. A range of questions and issues have been forwarded as requiring dialogue if occupational scientists are to take up transformative approaches. For example, is there space within occupational science to embrace conceptualizations of science grounded in paradigmatic viewpoints that shift away from science as a value-free enterprise towards science as always political? Can members of the discipline, within their varied socio-political contexts, risk the challenges of taking up critical, transformative approaches, for example, questioning the very institutional systems and structures in which they exist, developing strategies to engage in political arenas, extending partnerships outside of academia, and being open to challenges of taken-for-granted beliefs regarding occupations from diverse viewpoints?

2.6 Future considerations

This analysis of the published critical work in occupational science aimed to raise awareness of the underlying assumptions and claims of such work (Alvesson & Sandberg, 2011, 2013), as means to both consider how critical perspectives and research have been and might continue to be taken up. Having recognized that critical approaches have been present for more than 17 years in occupational science literature, the call for a critical discipline seems no longer to be just a proposal. Instead, it seems to be a growing and stable scholarly movement that has been seeking to push beyond the limits of what has been considered to be the role of science in occupational science, to a notion that supports

and provides tools for engaging in knowledge generation and action with and for the communities with whom occupational scientists engage (Hocking, 2012; Laliberte Rudman et al., 2008; Magalhães, 2012). In this way, the next steps and challenges that occupational scientists who aim to embrace a critical turn towards transformative approaches need to confront are: to take an activist standpoint, to break the barrier between science and action, to reconfigure their positions and the way in which they negotiate with the institutional and political demands in which they are immersed, and to reconfigure the sensibility underpinning their work within the discipline to a transformative approach. Consequently, the remaining questions that occupational scientists need to ask are: do they want to stay in this, perhaps, more comfortable position as a critical science (e.g. criticising themselves and the world), or do they want to create space within their discipline to move forward in transformative directions?

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Chapter 3

3 Illustrating the importance of critical epistemology to realize the promise of occupational justice⁶

An international movement embracing the potential, and responsibility, of occupational therapy and occupational science to address occupational injustices has emerged (Kronenberg, Simo Algado, & Pollard, 2005; Townsend & Wilcock, 2004; Whiteford & Hocking, 2012). However, it has been forwarded that moving beyond the contemporary positioning of occupational therapy and science within health sciences and biomedicine—fields largely dominated by positivist/postpositivist thinking—has placed scholars and practitioners at an uneasy crossroads as they attempt to address sociopolitical determinants of occupational injustices (Galheigo, 2011; Malfitano, Lopes, Magalhães, & Townsend, 2014; Pollard & Sakellariou, 2014). In this article, we propose that this situation is partly due to the epistemological foundations of the profession and discipline that often have bounded the practice and study of occupation within individual-focused approaches and positivist notions of science (Hocking, 2012; Kantartzis & Molineux, 2011; Magalhães, 2012). Parallel to this contention, this article builds upon scholarship that argues for the need to embrace critical epistemological perspectives to question the foundations of the profession and discipline, promote a more complex conceptualization of occupation in relation to people who experience varying forms of marginalization, and engage with critical approaches to knowledge construction that can inform our understandings of the sociopolitical shaping of occupational injustices (Farias & Laliberte Rudman, 2016; Galheigo, 2011; Gerlach, 2015). This article adds to this body of scholarship through critically examining an approach to transformative scholarship proposed by John Creswell to illustrate the limits that arise when relying on positivist/postpositivist assumptions that obscure the necessity of questioning the power

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relations, conditions, and processes by which some groups are marginalized and excluded.

In this article, the authors draw on the concept of critical reflexivity, a particular form of reflection, that can promote creation of a space for examination of taken-for-granted understandings and assumptions to problematize the construction of dualities (e.g., hegemony/resistance, insider/outsider) and our positionality within issues of power (Kinsella, 2012; McCorquodale & Kinsella, 2015). Critical reflexivity has been introduced in the occupation-based literature as a concept that involves and surpasses the process of reflection by adding a critical dimension to it. This critical dimension entails an “act of interrogating one’s situatedness in society, history, culture, and how this may shape one’s values, morals, and judgements at both individual and social levels” (Phelan, 2011, p. 165). For example, Kinsella and Whiteford (2009) emphasize the potential of reflexivity to go beyond reflection to question the interpretative systems and conditions that influence how knowledge claims are embraced and constructed. Thus, drawing on feminist theory (Haraway, 1988; Nast, 1994) and poststructuralism (Foucault, 1980), and building on the definitions of critical reflexivity provided above, we view this concept as a complex act that asks one not only to interrogate the process by which our professional and disciplinary discourses and knowledge have been constructed but also to enact transformation. Critical reflexivity is central to the arguments forwarded in this article because of its potential to engage with critical epistemological approaches as means to draw attention to broader social issues that create and sustain injustices, thereby fostering new viewpoints and action.

Within this article, we employ the term occupational justice as a conceptual frame that has attempted to shift emphasis toward social relations and sociopolitical conditions that extend beyond individuals and shape people’s occupational possibilities for participation in society (Stadnyk, Townsend, & Wilcock, 2010; Townsend & Wilcock, 2004). For example, in explicating occupational injustices, Townsend and Wilcock (2004) argued that such injustices occur when people’s participation in meaningful and enriching occupations is restricted by contextual and sociohistorical forces. We acknowledge that the term has been conceptualized and taken up in multiple ways within the literature of occupational therapy

and occupational science, sometimes in ways that recenter an individualistic frame. While it is beyond the scope and purpose of this article to expand on the ongoing discussion regarding the lack of conceptual clarity about occupational justice, we acknowledge that this term has faced critiques and challenges within occupational therapy and science communities (Bailliard, 2016; Durocher, Gibson, & Rappolt, 2014). At the same time, by arguing for the need to incorporate critical approaches and critical reflexivity to avoid individualistic interpretations of injustices, we aim to contribute to the ongoing process of delineating what is meant by occupational justice work and how it can be understood.

Along these lines, we conceive the appearance and continued evolution of the concept of occupational justice in relation to the emergence of social justice discourses across a variety of health-related fields (Kagan, Smith, & Chinn, 2014; Reimer-Kirkham & Browne, 2006; Vera & Speight, 2003). These discourses seek to take up particular disciplinary and professional lenses to expose, illuminate, and/or transform issues of injustice such as poverty and marginalization as disturbing manifestations of differences in power relations in society (Browne & Reimer-Kirkham, 2014). Thus, conceptually, we understand social justice as “not susceptible to a single simple definition” (Anderson et al., 2009, p. 287) but rather as an ethical and moral principle of justice embodied in human rights. Parallel to this interpretation, we interpret calls to advance a social justice agenda within critical qualitative inquiry of relevance to the broader emergence of social justice discourses in health-related fields and the more specific emergence of occupational justice (Cannella, Pérez, & Pasque, 2015; Denzin & Giardina, 2009).

This article is organized in four sections, all of which center on concerns with epistemology. By epistemology, we refer to the beliefs and rationale underpinning the relationship between the inquirer and the known (Lincoln, Lynham, & Guba, 2011). According to this definition, discussions regarding epistemology are essential when considering that epistemological assumptions provide grounding for deciding what kinds of knowledge, concepts, and issues are legitimate, which in turn shape scholarship and practice. First, we identify an epistemological tension underlying how the concept of occupational justice is often taken up within occupation-based literature and the stated intentions to create a more just society. Second, we introduce transformative scholarship

and call for ongoing interrogation of the epistemological assumptions that shape interventions and research addressing occupational justice. Third, we draw on the epistemological location of an approach to transformative scholarship proposed by Creswell (2015) to illustrate the limitations of bringing together positivism/postpositivism and the goals of justice within a transformative perspective. In this section, we also draw on examples from occupation-based literature to demonstrate how epistemology interacts with and can bind our understanding of occupational injustices and practice. Finally, we conclude by advocating for more complex analyses of occupational injustices by employing critical reflexivity and key elements from critical epistemological perspectives.

3.1 Attending to epistemology in relation to occupational justice

Occupational justice provides a conceptual frame that could be taken up within transformative scholarship and practice to move beyond an individual level to change the sociomaterial structures that shape occupational injustices (Durocher, Rappolt, & Gibson, 2014; Laliberte Rudman, 2015). However, if we do not engage in ongoing critical reflexivity, our intention to address occupational injustices runs the risk of keeping the individual at the center of the occupational analysis given the historical predominance of an individualistic and positivist/postpositivist frame (Galheigo, 2011; Laliberte Rudman, 2015; Malfitano et al., 2014).

The tendency to individualize occupational injustices has been noted by some scholars, such as Hocking (2012) who criticizes individualism “as a dominant epistemic frame that is problematic for occupational science” (p. 58) that fails to interrogate the complex causes underpinning occupational injustices. Examples of this individualistic focus can be readily identified within the occupation-based literature. For instance, Smith and Hilton (2008) analyze women with disabilities who have experienced intimate partner violence from an occupational justice perspective, portraying this group as in need of empowerment or ability to “focus on what they do, what they want to do but cannot, and how they might go about changing what they do or feeling good about what they do” (p. 170). This example illustrates an important recognition of the need to generate solutions

to the domestic violence problem although forefronting changing women's choices as the solution risks perpetuating a Western positive focus on the individual.

Similarly, Arthanat, Simmons, and Favreau (2012) explore personal meanings of occupational justice among consumers of assistive technology (AT) using Townsend and Wilcock's (2004) definition of occupational injustice. While these authors integrate concepts such as occupational deprivation and marginalization, which explicitly recognize factors beyond individuals' control that restrict occupation, the study focuses on participants' perceptions of how AT devices enable their social participation. Hence, while these examples integrate an important motivation for creating "an occupationally just world" (Stadnyk et al., 2010, p. 330), addressing social issues from an individualistic perspective is insufficient when dealing with social matters that demand taking into account the wider social macro-processes that shape people's lives (Alvesson & Sköldbberg, 2009; Galheigo, 2011). Thus, as articulated by Hocking (2012), we need to "move beyond (often romanticized) accounts of individualized experiences if the discipline wants to make any contribution to understanding and responding to occupational issues of people who experience systematic disadvantages and marginalization" (p. 59).

Based upon the analysis of potential discrepancies that have arisen between the beliefs underlying an occupational justice approach oriented toward changing sociomaterial structures and the values that have historically bounded us to an individual-oriented practice, scholars have taken up critical approaches to interrogate the epistemological values and approaches that underlie our work. Indeed, within literature more broadly advocating for socially responsive practice and scholarship, this integration of critical epistemological perspectives has created various spaces, for example, to examine the role of occupation in the reproduction of unequal power relations as well as draw attention to occupation as a situated phenomenon (Galvaan, 2015; Laliberte Rudman & Huot, 2013). Likewise, this incorporation of critical perspectives into the occupation-based literature, along with the emergence of occupational justice, has supported the reconceptualization of occupation as a political phenomenon, embedded within broad social relations of power, systems, and structures that create and/or maintain differential access to and

opportunities for occupation (Farias & Laliberte Rudman, 2016; Nilsson & Townsend, 2010).

In addition, critical approaches have begun to be embedded within models to guide practice that attend to structural contexts and sociopolitical processes that exclude communities from fully participating in social life through and with occupation. For example, Galvaan and Peters' (2014) occupation-based community development framework employs theory drawn from occupational therapy and science to inform practice that challenges and rethinks the realities and issues faced by youth who experience occupational injustices. Watson and Swartz's (2004) prototype of transformation through occupation also takes up elements from critical epistemological perspectives, occupational therapy, and science to call for a reorientation of the profession toward community and population's needs. In doing so, this model advocates for the recognition of people's right to be meaningfully and purposefully occupied, and for positioning occupational therapists as catalysts for social transformation. Similarly, Occupational Therapy Without Borders (Kronenberg, Pollard, & Sakellariou, 2011; Kronenberg et al., 2005) integrates critical approaches to reveal the influence of socioeconomic and political conditions on occupation, the profession and practice. These examples build upon the concept of occupational justice and its attention to situations in which participation in occupation is alienated, exploited, marginalized, or otherwise restricted by the economy, social policies, and other forms of governance (Townsend & Wilcock, 2004). Thus, there appears to be recognition of the importance of integrating critically informed approaches to extend the study and practice of occupation beyond biomedical understandings of the body and disease toward issues of justice (Malfitano et al., 2014).

At the same time, several concerns have been forwarded as requiring immediate dialogue to ensure that in moving forward as a socially and politically engaged discipline and profession we do so in ways that are congruent with the values underlying these intentions (Farias & Laliberte Rudman, 2016; Farias, Laliberte Rudman, & Magalhães, 2014). For instance, Magalhães (2012) proposes that despite a stated commitment to addressing occupational injustices, the discipline of occupational science seems stuck in

moving beyond articulating a commitment to enacting social change. Similarly, in explicating their rationale for compiling an edited book addressing occupation, social inclusion, and participation, Whiteford and Hocking (2012) identify the need to move beyond stated intentions and further enact occupational science in ways that address pressing global social issues such as unemployment, poverty, and participating in antisocial life-threatening occupations. Based on these arguments, it seems that we are 'stuck' in our ability to move forward, failing to translate our intentions for enhancing justice through occupation (Whiteford & Hocking, 2012).

Thus, in this article, we focus on how advancing the ability to fulfill the promise of occupational justice requires critical reflexivity regarding an epistemological tension between the stated intentions to enact occupation-based work to create a more just society and the positivist/postpositivist beliefs that often underlie scholarship intended to inform practice (Laliberte Rudman, 2014; Magalhães, 2012). Building on the work that is forwarding a vision of social transformative work in occupational therapy and science, we seek to advance an understanding of the epistemological assumptions that can inform this work so as to enact social transformation.

3.2 Transformative scholarship: The importance of critical epistemology

Critical epistemology often serves as an umbrella that encompasses a broad and evolving group of theoretical approaches and positionalities that share some key epistemological assumptions (Table 3) regarding the nature of knowledge and the processes through which knowledge can be constructed (Kincheloe & McLaren, 2005). Specifically, critical epistemology is concerned with knowledge that is subjective and grounded in personal and professional sociohistorical processes. In line with this, critical practitioners and researchers assume that the type of knowledge being sought in critical research is far from being value-free or universally true, and therefore consider it essential to conduct ongoing interrogation of their political or moral stance, ideology, and positionality with relation to their clients/participants (Fine, Weis, Wesson, & Wong, 2003; Lather, 2004). Although discussions regarding the importance of epistemology in occupation-based work seem to be at an early stage, explicit calls for critical reflexivity regarding the

epistemological assumptions and beliefs that shape our interventions and research have materialized (Galheigo, 2011). For example, Kinsella and Whiteford (2009) and Kinsella (2012) argue for the need to engage in critically reflexive epistemological dialogue to consider how the development of professional and disciplinary knowledge is shaped by complex social processes that make knowledge construction neither a simple nor a neutral process. They suggest that constant interrogation of the paradigms and theories we embrace is part of our collective responsibility “if we are to actively set an agenda for our profession that is coherent with our values” (Kinsella & Whiteford, 2009, p. 251).

Table 3

Key epistemological assumptions

Positivism/Post-positivism	Critical
The investigator and the investigated object are assumed to be independent of one another, and the investigator to be capable of studying the object ‘how it really is’ without influencing or being influenced by it (Dualist and objectivist).	The investigator and the investigated object or group are assumed to be interactively linked, with the values of the investigator inevitably influencing the inquiry (Transactional and subjectivist).
Findings are considered true and replicable.	Findings are highly value mediated and require structural/historical insights.
Values are prevented from influencing outcomes. Inquiry takes places as through a one-way mirror.	Inquiry is driven by the goal of inciting social transformative processes in directions that support justice and emancipation.
The focus of study is related to achieving scientific rigor, with application/impact of knowledge separated out from its production.	The focus of study is related to social structures, freedom and oppression, power and control. Researchers believe that the knowledge/critique produced can change existing oppressive structures; aim of transforming misapprehensions and taken-for granted notions into more informed consciousness.

Source: Own construction, based on Lincoln, Lynham and Guba (2011)

Much of the work addressing intersections between occupation, power, and justice has implicitly or explicitly been defined as social transformative work within the occupation-based literature (Laliberte Rudman, 2015; Pollard, Sakellariou, & Kronenberg, 2008; Townsend, 1997; Watson & Swartz, 2004). For example, Pollard (2011) argues that social transformative work, facilitated by the integration of critical approaches, has emerged in occupational therapy seeking to reconsider our position in power structures that maintain occupational injustices and to support questioning of our goals of social transformation and agency for social change.

Although the integration of critical approaches has brought forth new insights to occupational practice and scholarship such as the broader goal of social transformation, there is no one definition of social transformative work. Therefore, it is crucial to articulate what we mean by occupation-based social transformative work to distinguish it from ‘common sense’ or biomedical forms of practice. Thus, in this section, we address the meaning of social transformative scholarship as it is understood by social scholars embedded within critical epistemology to facilitate dialogue regarding how we in occupational therapy and science want to describe social transformative work.

The emergence of transformative scholarship has been partly prompted by the recognition that a positivist/postpositivist epistemology has not been sufficient in attending and readdressing prevailing forms of inequalities/injustices (Mertens, 2009). This criticism is based on positivist/postpositivist epistemology assumptions (see Table 3 for key assumptions) that conceive reality as independent of its social context and researchers independent of knowledge production, and therefore disconnected from social class, moral, values, and the political or moral position of the inquirer (Galheigo, 2011; Guba & Lincoln, 2005). This implies that positivist/postpositivist epistemology treats science/knowledge as essentially an individualistic enterprise, running the risk of reducing the study of collective phenomena (e.g., institutions, ideologies, and social norms) to the study of attributes of individuals (Usher, 1996).

In parallel, the concept of social transformation has increasingly been used within social science and critical qualitative inquiry to call for an emancipatory agenda that embraces

social justice as both a political and ethical commitment (Denzin & Giardina, 2009; Kincheloe & McLaren, 2003). As such, social transformation is often associated with research and practice addressing the hidden structures of power that construct and maintain privilege while disempowering other groups, knowledges, ways of being, and perspectives (Kincheloe & McLaren, 2003). Parallel to critical epistemological assumptions, social transformation thus centers considerations of power, considering it as complex, dynamic, and multiple. In this context, social transformation has become a major rationale for rejecting a common positivist/postpositivist tendency to naturalize certain perspectives and assumptions as true (e.g., accepting historically mediated structures as immutable). Thus, a key element of social transformative work commensurate with critical epistemology is the process of denaturalization (i.e., deconstruction of taken-for-granted assumptions). This process of challenging the nature of meanings, social constructs, and power relations demands not only the identification of injustices but also questioning of why things “are not right as they are” (e.g., what conditions, practices, and discourses (re)create injustices) to propel emancipation and social action (Sayer, 2009, p. 781). Consequently, it can be said that social transformation informed by critical epistemology and a moral commitment to justice aims to be emancipatory, identifying the root causes or conditions that maintain things as they are as its central moral purpose (Santos, 2014). However, this moral purpose is not merely a matter of saying that things are not right as they are or about identifying suffering/injustices, but about pointing out the hidden features of discourses, assumptions, and modes of thought that cause suffering/oppression and that can be altered to promote justice (Sayer, 2009).

From the term *social* in social transformation, it is possible to infer a social or collective orientation that implies that human emancipation depends on the transformation of the social world and not just the individual inner self (Bhaskar, 1989/2011; Wright, 2010). Thus, social transformative projects embody engagement with collective perspectives and counterhegemonic forms of knowledge that are concerned with realities inside of, as well as outside of, the dominant status quo (Gramsci, 1971; Santos, Nunes, & Meneses, 2007). These partnerships support processes of co-construction of knowledge in context with those who have lived experiences of oppression/injustice to inform how social conditions

are embodied in their experiences, and how people seek to build a more resilient, critically engaged, and meaningful society (Anderson et al., 2009).

Consequently, from this critical standpoint, we define social transformative scholarship as critically engaged processes that embrace and recognize alternative forms of knowledge to seek out debates, concerns, and proposals to expose hidden possibilities, and challenge the status quo sustained through power relations. In relation to occupational justice, such transformative scholarship would seek to address social issues by exposing the interconnections between economy, history, politics, and sociocultural values, and their impact on either supporting or depriving collectives of opportunities for occupational participation from multiple vantage points (Galheigo, 2011). However, embracing critically engaged processes can be particularly challenging within our contemporary context in which neoliberalism—a political economic theory that promotes particular values such as rationality, self-sufficiency, autonomy, and individualism—shifts the responsibility for well-being and prosperity onto individuals away from the community or government (Gibson, 2016; Ilcan, 2009). Within such contemporary conditions, the need for continuous critical reflexivity regarding epistemological underpinnings becomes imperative.

3.3 Unpacking the limits of a transformative design underpinned by positivist/postpositivist epistemology

In this section, we critically analyze a contemporary approach to transformative scholarship proposed by Creswell (2015). We employ this example because its epistemological location illustrates the limitations of bringing together positivism/postpositivism and the call for justice. With this example, we seek to demonstrate why it is crucial for occupational therapists and scientists to embrace critical reflexivity to continuously interrogate epistemological assumptions that may contribute to perpetuating individualistic understandings of occupational justice that fall short in attempts to enact social transformation.

Creswell (2015) introduces the term transformative to describe projects that have a social justice agenda and enact a transformative, mixed methods design. Under this approach,

“social justice or transformative designs are those in which the researcher includes a social justice framework that surrounds the convergent, explanatory, or explorative design” (2015, p. 7)

According to Creswell, such designs aim to explain a problem with an overall social justice framework threading through the study and influencing it at various possible points, such as informing the type of questions asked, the type of participants recruited, and prompting a call to action at study completion. This social justice framework can encompass any combination of lenses drawn from social science, such as feminist or disability theories.

However, a closer examination of this social justice/transformative design reveals tensions related to its philosophical foundations. First, the nature of this design seems to employ a postpositivist version of qualitative research (Eakin, 2016) that is congruent with the overall positivist/postpositivist framing of concurrent or sequential quantitative and qualitative data proposed by Creswell. This means that qualitative research is employed as a method or technique that can be chosen from a ‘toolbox’, separated from its diverse philosophical stances. As such, this framing influences how qualitative data are collected and analyzed, that is, through a realist, objectivist lens that considers data as real and independent of the researcher (Eakin, 2016). Therefore, although Creswell’s social justice design aims to incorporate a social justice theoretical lens throughout the study, its epistemological stance likely limits the researchers’ ability to draw on social science concepts or theory to inform how he or she ‘sees’ the world as it is assumed that both are independent of one another.

For example, this positivist/postpositivist nature is reflected in how ‘the problem’ or phenomenon under study is examined. Following assumptions that consider reality as objective, Creswell’s social justice design seems to study predetermined problems given to the researcher/evaluator without questioning “who/what is helped/privileged/legitimated and who/what is harmed/opposed/disqualified” by framing the problem in this way (Cannella & Lincoln, 2009, p. 54). Such lack of questioning of the problem as ‘it is given or already there’ positions the phenomenon under study as disconnected from its

social definition/construction within prevailing power relations. In turn, it is assumed that it is thereby possible to gather, measure, and/or systematize the problem as it has been dominantly understood (Alvesson & Sköldbberg, 2009). Thus, an underlying assumption within this design is that it is possible to measure and/or describe a problem or phenomenon as it presents itself, without the need to address the influence of culture, society, or institutions on how the problem has been constructed. An example of the limitations that can arise when such a positivist/postpositivist epistemological stance is dominant can be found in VanLeit, Starrett, and Crowe's (2006) explanatory study of occupational concerns of women who are homeless and have children. Drawing on an occupational injustice perspective, VanLeit and colleagues succeed in identifying a range of social barriers to participants' occupational participation and raising awareness of how participants experience occupational injustices. However, the analysis could have been extended by critically interrogating participants' concerns to situate individual experiences and thereby reveal the systemic roots of homelessness. In this way, the authors, for example, could have expanded the problematization of the causes of homelessness from the participants' limited educational backgrounds, which lead to difficulty in obtaining employment, and to broader attention to the historical and contemporary social forces shaping educational and employment possibilities in relation to gender, social class, housing status, and other social conditions.

From a critical epistemological stance, the lack of critical analysis or deconstruction of 'what is given' as a problem and the context in which it has been shaped is inherently problematic, given that power relations are viewed as always at play in how problems come to be defined and, in turn, what solution frames come to be seen as possible and ideal (Sayer, 2009). In addition, starting with a stance that takes the problem as 'it is' has come to be defined as contrary to the purpose of social transformation, which as defined earlier requires the emergence of diverse forms of knowledge to challenge the influence of the social order on everyday occupations. Thus, Creswell's social justice design is problematic as it does not question who determines the phenomena as a problem and what power relations and contextual factors shape, create, and/or maintain it. In turn, the solutions that can be offered up as means to address the problem become confined within the same systems of thought used to define it, problematically failing to think 'outside the

box' or other dominant frames within which the problem is recreated (Alvesson & Sköldbberg, 2009). For instance, if issues related to occupational injustice are only explored in relation to how social problems have come to be dominantly defined in neoliberally informed contexts, we risk conceptualizing the problem as a matter of individual choice, self-determination, and/or personal responsibility, focusing our efforts on 'fixing' the individual instead of addressing the social structural issues that open up or close down possibilities for people's participation (Hocking, 2012; Laliberte Rudman, 2013). Illustrating this point and the potential of further incorporation of critical epistemological perspectives, Gerlach, Browne, and Suto (2014), addressing the construction of play in developmental discourse and child protection policies, argue for taking up critical approaches to move beyond the individualistic discourse within occupational therapy that assumes play as a mother's choice, neglecting Indigenous families multiple and intersecting forms of social disadvantage rooted in structural and historical injustices. They highlight how judging indigenous parent–infant play against Western normative standards can increase the likelihood of focusing on the individual, blaming and shaming parents as neglectful and labeling children as 'at risk', which silently perpetuates a normalizing and colonizing agenda (Gerlach et al., 2014). In this context, a questioning of how the problem has been shaped makes it possible to open up new ways of reframing the problem and new types of occupational therapy practice that consider the broader structural and historical forces that shape occupation. Another example of research that advances transformative practice through the incorporation of critical epistemological perspectives is Galvaan's (2012) work, conducted with young adolescents in South Africa, questioning the concept of occupational choice. She highlights the need for a more complex and contextualized understanding of how socioeconomic and political forces bind individuals' occupational choices. This research is particularly significant as it problematizes the assumption that power to exert choice related to occupations exist, pointing to the need for research and practice that go beyond focusing on individuals' preferences to uncover the multiple ways in which occupational choice is determined through contextual factors.

Moreover, the social justice/transformational design outlined by Creswell does not articulate a moral or political stance regarding social justice/transformation. This lack of

philosophical articulation is problematic as designs underpinned by social justice and social transformation address morally significant questions related to how certain groups are more likely to experience social conditions that contribute to disparities, and what forms of disparities come to be understood as constituting injustices (Kirkham & Browne, 2006). This implies that transformative approaches informed by critical epistemological perspectives emphasize that what we ‘see’ is not detached from the observer’s moral values, and therefore practitioners and researchers need to problematize their own standpoints and how they themselves are influenced by dominant discourse through critical reflexivity (Sayer, 2009). Thus, consistent with a commitment to social justice and transformation, it is seen as essential to engage in ongoing dialogue with those who experience marginalization/social exclusion to avoid imposing our appraisals of what is just or unjust, and collaboratively construct a more socially responsive and justice-oriented research and practice.

3.4 Concluding remarks

Occupational justice and social justice are complementary concepts that share a common belief in the need to address injustices controlled through regulations, policies, and other mechanisms that promote unfair advantage, mistreatment, and domination by some groups in society (Wilcock & Townsend, 2000). Specifically, we view the emergence and ongoing development of occupational justice as a specific disciplinary example of a broader turn to social justice across various disciplines. For example, nursing scholars have increasingly drawn on critical epistemological perspectives to better understand how people’s health are shaped by historic, political, and economic conditions, taking up issues of racialization, culturalism, and discrimination as factors constraining social justice (Browne & Tarlier, 2008). Framed in relation to critical perspectives, a commitment to social justice has facilitated a more complex and contextualized understanding of health as a human right, drawing attention to more socially oriented interpretations that take into account structural inequities as the ‘causes of causes’ of health and social injustices. As Reimer-Kirkham and Browne (2006) articulate, a commitment to social justice can support shifting from individualist interpretations to a

collective concern that “takes us beyond the righting of distributive (economic) inequities to include the need for political, economic and relational transformations” (pp. 335-336).

Our intent in this article is to examine the consequences of grounding occupational justice-oriented work within epistemological locations that promote individualization of injustices, obscuring understandings of root causes linked to social, economic, and structural relations. Furthermore, we question whether, in the enthusiasm for working toward a more just society, we may inadvertently rely on familiar positivist/postpositivist epistemological stances that can result in situations where “we facilitate adaptation to current unjust social structures rather than any effective address of issues such as poverty, systematic diminishment of life opportunities (participation as full citizens), and health disparities” (Kirkham & Browne, 2006, p. 337). To help reframing our efforts, we propose critical reflexivity as a tool that in combination with critical epistemological perspectives can support the complex analysis of occupational injustices in research and practice. Thus, being that occupational justice is a complex frame, we attempt to illustrate how a more widely accepted positivist/postpositivist frame, which may be increasingly promoted with a neoliberal climate stressing the need for objectivity in science and evidence (Cheek, 2008), is implicitly embedded in Creswell’s approach to transformative research.

Enacting an occupational justice agenda within occupational therapy and science that is transformative is a difficult and complex challenge, particularly in contemporary sociopolitical contexts that often emphasize values of individualism and economic end points rather than collectivism or justice (Ilcan, 2009). Critical dialogue addressing the epistemological foundations that underlie our work is essential to move toward developing and implementing transformative and justice-oriented practices that attempt to more fully consider the complexities of people’s everyday lives, such as poverty and material life circumstances, and not only address the symptoms but also the root causes of injustices (Kirkham, Baumbusch, Schultz, & Anderson, 2007). To facilitate this dialogue, we propose embracing two basic assumptions aligned with critical epistemology; there are power relations in society that simultaneously create privilege and disadvantage, and these unequal power relations can accept, or even collaborate in

maintaining oppressive aspects of systems (Cannella & Lincoln, 2009; Kincheloe & McLaren, 2003). These key critical epistemological assumptions can help us understand the interconnection between occupation, power, and justice, and reflect on how these assumptions can provide a foundation for social transformative occupational justice work. In line with this, these assumptions have the potential to guide theoretical and methodological choices that guard against individualistic interpretations of justice and promote a social lens that recognizes that politics matters within issues of occupation. Thus, critical reflexivity about epistemological assumptions are not meant to only question our practices for its own sake, as some might argue, but rather they are very practical in that they may help us to examine assumptions that underlie our practices and perpetuate injustices (e.g., placing blame, shame, and responsibility on the individual instead of the structures that (re)produce inequities).

Furthermore, by embracing these key critical epistemological assumptions, it is possible to conceive power as multidimensional, implying that power operates and is exercised in different ways and at different levels at the same time. This implies that social transformation does not always involve a reversal of power relations but a strengthening of the negotiating power of people/communities within these relations. In line with this, embracing critical epistemological approaches can facilitate recognition of the profession and discipline's moral responsibility and commitment to the very persons and communities with whom we engage. This potential for seeking to work with communities in democratic, inclusive, and respectful ways builds on the two traditions presented in this article, critical epistemological approaches and transformative scholarship, and aligns with reflexive and collaborative/participatory directions (Browne & Reimer-Kirkham, 2014). Furthermore, such a stance seeks to support people's resistance, strengths, and rights to have a say in actions that affect them and claim to generate knowledge about them, thereby disputing conservative perspectives of representation and moving away from an expert position (Denzin & Giardina, 2009; Santos, 2005, 2014).

Considering the potential of occupational justice for social transformation, this article encourages practitioners, scholars, and students to clearly examine their own assumptions about what kind of knowledge is possible/adequate/legitimate and to question what we in

occupational therapy and science mean by occupational justice work and how we enact it. Furthermore, it recommends engaging with critical epistemology to avoid individualizing social issues and maintaining rather than disrupting or challenging the status quo. Finally, it encourages imagining a vision for social transformative work that aligns with moral, political, and ethical commitments to address occupational injustices and to work collaboratively between occupational science and therapy supporting each other's efforts.

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Chapter 4

4 Reclaiming the potential of transformative scholarship to enable social justice⁷

The idea of this paper came about in response to a current tension within the disciplinary home of the first three authors, specifically occupational science. This tension is arising as scholars increasingly attempt to take up the discipline's moral and ethical commitment to social justice while at the same time being located within health sciences (Frank, 2012; Whiteford & Hocking, 2012) – a field largely grounded in positivist/post-positivist conceptualizations of the scientific method (Gibson, 2016). Thus, in an attempt to move beyond the historical predominance of individualistic and positivist/postpositivist frames, this paper responds to the increasing desire for taking up occupational science's early calls to attend to the transformative potential of occupation to address social inequities (Townsend, 1997; Watson & Swartz, 2004). By aiming to understand and address this tension, we explore literature addressing other health disciplines' similar expressions of struggle. From this standpoint, the intent of this paper is to build on the efforts of occupational science and other disciplines such as nursing (Peter, 2011; Reimer-Kirkham & Browne, 2006), the disciplinary home of the fourth author, to mobilize social transformative efforts capable of capturing the systemic and complex root causes of social and health inequities.

For this purpose, we turn to the broader context of critical qualitative inquiry, a multidisciplinary movement that similarly to occupational science is attempting to take up methodological approaches to draw attention to issues of power and positionality in order to increase possibilities for social justice (Cannella, Pérez, & Pasque, 2015). The expansion of critical qualitative inquiry over the past two decades has been stimulated by several socio-political and economic factors, such as the global rise of neoliberalism; a political economic theory that promotes postpositivist assumptions of objective science

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and values such as self-sufficiency, autonomy and individualism, shifting the responsibility for well-being and prosperity onto individuals away from the community or government (Gibson, 2016; Ilcan, 2009; Njelesani et al., 2013). In response, many scholars have reoriented inquiry to move beyond the individual experiences of those marginalized/excluded, to focus on the socio-political conditions that shape their possibilities for changing oppressive structures (Cannella et al., 2015; Denzin & Giardina, 2009; Hsiung, 2016; Meyer & Paraíso, 2012). As such, the term transformation has been used within critical qualitative inquiry in relation to the constraining impact of neoliberalism on collective opportunities for responding to issues of injustice and exposing the power relations and conditions that contribute to maintaining disparities (Kirkham & Browne, 2006).

This increasing integration of critical perspectives to address social injustices reflects scholars' need to (re)engage with the foundations of qualitative inquiry as a reformist movement that started in the early 1970s in academia, involving diverse paradigmatic formulations and ethical criticism of traditional/positivist science (Schwandt, 2000). Although somewhat existing at the margins, critical qualitative inquiry has created a multidisciplinary space focused on how qualitative inquiry can be used for transformative intents which emphasizes the necessity of engagement with critical social theory (Cannella et al., 2015; Johnson & Parry, 2015). As such, transformative scholarship underpinned by a critical stance embraces assumptions of inquiry that are far from being value-free or universally true, requiring researchers to take an explicit political or moral stance while interrogating their positionality in relation to the phenomenon under study (Fine, Weis, Wesson & Wong, 2003; Lather, 2004). For instance, the term transformative is often associated with scholarship addressing the hidden structures of power that maintain unequal power relations in society that simultaneously create privilege and disadvantage (Kincheloe & McLaren, 2005). Thus, at its core, transformative scholarship embodies a commitment to revealing unequal relations or conditions that cause injustices and altering such relations or conditions by promoting new viewpoints and possibilities for resistance and justice (Cannella et al., 2015; Kincheloe & McLaren, 2005).

Broadly, the interest for employing critical perspectives in qualitative research for transformative purposes has been articulated by various scholars, such as Denzin, Lincoln, Giardina, Tuhiwai Smith, and Hsiung, among others, in recent years (see Cannella et al., 2015; Denzin & Giardina, 2009; Hsiung, 20016; Johnson & Parry, 2015; Meyer, & Paraíso, 2012). Yet, as Cannella and Lincoln (2009) point out, the utilization of critical perspectives to orient research does not ensure social transformation. For example, perhaps the most common problem seen in the health sciences is that there is a partial adoption of critical lenses, particularly in terms of an espoused critical intent to readdress injustices, with a persistent reliance upon dominant positivist/postpositivist assumptions that promote singular truths and predetermined ways of thinking that do not question the status quo (Farias, Laliberte Rudman, & Magalhães, 2016). As articulated by Cannella and Lincoln (2009), “Although many contemporary researchers claim to use critical qualitative research methods (and we are among those), these inquiry practices often do not transform, or even appear to challenge, the dominant mainstream constructions” (p. 53).

Thus, to ensure that critical qualitative work maintains consistency with its critical roots and social transformation purposes, scholars continue to push away from the boundaries of positivism/postpositivism in order to develop contextual understandings of the socio-political roots of injustices (Johnson & Parry, 2015).

Drawing on the work of scholars who make the distinction between research paradigms such as positivist/postpositivism and critical (Denzin & Lincoln, 2005), we view paradigms as dynamic commitments to philosophical assumptions and values that permeate and connect all dimensions of inquiry. As such, conscious or unconscious of these connections, a researcher’s approach to inquiry is inextricably linked to philosophical assumptions, perpetuating dominant research paradigms or seeking to disrupt them (Pasque, Carducci, Kuntz, & Gildersleeve, 2012). Thus, a disconnection or unrecognition of researchers’ standpoints often manifests as dangers to social transformation and justice, especially when such an unconscious paradigm is built from contradictory philosophical assumptions (Pasque et al., 2012). In the next section, we turn to two scholars who have offered up contemporary frameworks for transformative

scholarship to illustrate the limits of engagement with social transformation stemming from epistemological tensions. Building on concerns regarding critical qualitative inquiry raised by scholars such as Cannella and Lincoln (2009), we argue that the epistemological foundations and values that guide transformative scholarship are integral to addressing social, health, and other forms of inequities. We also argue for combining critical and participatory traditions, and other forms of critical qualitative research, as means to more fully embrace the intent of transformative scholarship, particularly in relation to the need for countering the individualizing tendencies of neoliberalism.

4.1 Deconstruction frameworks for transformative scholarship

In this section, I focus on two contemporary examples that self-identify as transformative. One is a social justice/transformational design launched by Creswell (2015) and the other is a transformational paradigm described by Mertens (2009). Our intent is not to articulate the details of each of these frameworks; but rather this deconstruction focuses on an epistemological tension between their stated intentions and the ways in which they frame transformational scholarship. It also demonstrates how this tension ultimately means that these frameworks do not align with critical qualitative inquiry.

According to Mertens, the emergence of a transformational paradigm has been partly stimulated by an increasing awareness of the need for other paradigmatic options in research evaluation and education psychology, fields largely dominated by positivist/postpositivist thinking (Mertens, 2009). This increasing awareness has pushed scholars as herself “to provide a different avenue of approach to solving intransigent problems” such as discrimination, marginalization and oppression (Mertens, 2009, p. 3). Accordingly, to ‘solve’ ongoing global inequities, Mertens’ transformational paradigm emerged as an overarching metaphysical framework that can support marginalized groups through research and evaluation that attempts to use results to enhance social justice (Mertens, 2009). Similarly, Creswell launched a social justice mixed methods design (also called transformational, emancipatory) as an alternative approach for studies that focus on “improving the lives of individuals in our society today” (2015, p. 7) and seek to

call for specific changes by “taking a theoretical stance in favor of underrepresented or marginalized groups” (Creswell & Plano Clark, 2011, p. 49).

Our aim in this section is to go beyond the stated critical intent of these transformative frameworks to remediate social issues and ally with those experiencing marginalization, to examine Creswell and Mertens’ work as examples of contemporary attempts to frame and prescribe how to do transformative scholarship. This critical analysis focuses on three problematics that we connect to the failure to embrace and enact a critical epistemological and axiological frame. First, we raise concerns regarding how these frameworks appear to take up a key aspect of positivist/postpositivist epistemology by naturalizing reality or accepting how an issue has come to be dominantly framed as essentially true. Second, we articulate the dangers inherent in promoting an individualistic perspective in interpretations of injustices. Third, we describe the risks of disconnecting researchers’ moral values and political stance from their work.

4.1.1 The problem of naturalizing reality and adopting an objectivist stance

The analysis of Creswell and Mertens’ frameworks allows us to observe how social transformation efforts can be carried along with common positivist/postpositivist tendencies that risk neglecting complex processes and structures that accept or maintain oppressive practices. One of these tendencies relates to the naturalization of reality as it presents itself as real or true, which is characteristic of positivist/postpositivist epistemological assumptions that conceive reality as ‘given’ (Chamberlain, 2000; Eakin, 2016). This location tends to promote notions of objective reality, that is, reality as pre-existing or already there, static and detached from its social construction and the researcher, and therefore possible to control and measure by the researcher (Alvesson & Sköldbberg, 2009). For example, this positivist/postpositivist tendency is reflected in how ‘the problem’ is examined. More specifically, Creswell’s design seems to study pre-determined problems given to the researcher/evaluator without questioning “who/what is helped/privileged/legitimated and who/what is harmed/opposed/disqualified” by framing a problem in a particular way (Cannella & Lincoln, 2009, p.54). Such lack of questioning of the problem as it is given or pre-defined, positions the phenomenon under study as

being independent of the observer, which in turn limits researchers' abilities to draw on critical lenses to question how the problem has come to be constructed and by whom and how it might otherwise be seen.

This positivist/postpositivist tendency can also be seen in the way qualitative inquiry is positioned within Creswell and Mertens' frameworks for transformative scholarship. In both cases, qualitative research is outlined as a 'toolbox' or 'cafeteria' where scholars can pick and choose methods separated from their philosophical stances (Eakin, 2016; Holstein & Gubrium, 2012; Pasque & Pérez, 2015). As such, this framing influences how qualitative data is collected and analyzed, that is, through an objectivist lens that naturalizes and reduces reality to 'what is seen' using specific technical means, which in turn can be unproblematically combined with what works (Chamberlain, 2000; Eakin, 2016). As result of this disconnection of inquiry from philosophy and theory, qualitative research becomes positioned in a service role that can "humanize statistics, enhance buy-in from researcher subjects or end-users, and explain conflicting or unexpected results" (Eakin, 2016, p.116) and critical qualitative inquiry is not achieved.

Furthermore, such objectification of reality can be inferred from Mertens' framework which promotes descriptive approaches that capture 'snapshots' in time that can be used to assess community needs (see Mertens 2009, Chapter 5). This naturalization of reality as static and as waiting to be captured tends to promote description as the primary objective of research at the expense of interpretation or deconstruction, that is, thinking about (i.e. interpreting, conceptualizing) the phenomenon under study through a theoretical lens and questioning how it has come to be understood (Chamberlain, 2000; Cheek, 2008). A positivist/postpositivist focus on description can promote stopping at 'what' questions (e.g. what are the needs of a community, what are the probable solutions to those needs) instead of moving into 'how' and 'why' questions necessary within critical qualitative inquiry to examine the conditions that maintain oppression or disadvantage and that can be altered to promote justice (Santos, 2014; Sayer, 2009). As such, the danger of overemphasizing description is that issues of social (in)justice can be perceived as out there; waiting to be solved through a list of prescriptive strategies or steps that risk disconnecting injustices from social processes and power relations.

From a critical standpoint, social transformation has become a major rationale for rejecting naturalization and objectification tendencies, promoting a process of denaturalization or deconstruction of what appears to be true, including what is assumed to be problematic, in order to transform it (Sayer, 2009). This position assumes that naturalizing and objectifying reality as static positions the knower as an external and passive individual in relationship to his/her context (Motta, 2013). As articulated by Freire “a person is [assumed to be] merely in the world, not with the world or with others; the individual is spectator, not re-creator” (2006, p.75, original italics). As such, this passivity is opposed to processes of transformation in which individuals are conceived as actors of their own emancipation. Thus, we propose a denaturalization rationale as fundamental for processes of social transformation since it promotes moving beyond identifying injustices to reinforce people’s capacities to challenge and disrupt the root causes of oppression (Sayer, 2009).

4.1.2 The problem of individualization

A second tendency that seems to underlie Mertens and Creswell’s frameworks relates to the process of individualization where “individuals are disembedded from existing social relations and traditional sources of social identity, such as social class” (Bolam, Murphy, & Gleeson, 2004, p.1356). Although the transformative paradigm and social justice design promote engagement with communities to enhance researchers’ cultural sensitivity and competence, these attempts seem to be used as a means to achieve higher validity (see Mertens, 2009, chapter 3). As such, Mertens and Creswell’s efforts for considering people’s views seem to focus on obtaining a more accurate description of reality rather than enabling critical, in-depth understandings of injustices, which aligns with a positivism/postpositivist preference for generating a valid report.

This tendency to focus on achieving a valid reading of reality, that is, decontextualized from socio-historical factors and power relations, runs the risk of obscuring the wider structures, practices and discourses that generate privilege and disadvantage (Bolam et al., 2004). This failure to place individuals within context in complex ways may mean that Mertens and Creswell’s frameworks can inadvertently (re)produce injustices by reducing them to individual and private experiences. The resulting individualization can

perpetuate injustices by placing blame, shame and responsibility on the individual (Bhaskar, 2011; Wright, 2010). Since the complex socio-economic and historical roots of structural inequities are neglected, the promotion of individualization within social transformative frameworks runs the risk of (re)orienting transformative efforts toward fixing the individual instead of addressing the social structural issues that shape peoples' lives (Farias, Laliberte Rudman, & Magalhães, 2016). At the same time, individualistic interpretations of injustices seem contradictory to the term 'social' in social transformation from which it is possible to infer a social or collective orientation that implies that human emancipation depends on the transformation of the social world and not just on the individual inner self (Bhaskar, 2011; Wright, 2010).

What is more, this tendency toward individualization is promoted within contemporary contexts influenced by neoliberalism that privilege values such as self-sufficiency and autonomy (Gibson, 2016; Ilcan, 2009). This tendency is often operationalized by discourses that conceptualize issues of injustice as a matter of individual choice/responsibility and/or self-determination (Bolam et al., 2004, p. 1359). As such, research that fails to question individualization risks obscuring the inequities produced through neoliberally-informed discourses and the practices they shape.

From a critical standpoint, the focus on validly capturing an objective reality is problematized based on the assumption that reality is contextually situated and complex, and therefore cannot be captured as a single and static form. A fundamental assumption that underlies critical qualitative inquiry is its opposition to the separation of individuals from contexts (Wilson-Thomas, 1995). On these grounds, social transformative efforts that attempt to achieve an objective and neutral representation of reality are seen as insufficient when dealing with social matters that demand taking into account the wider social macro-processes (i.e. historical, socio-economic, and structural factors) that open up and limit people's access to and possibilities for participating in society (Alvesson & Sköldbberg, 2009; Laliberte Rudman, 2014). For example, issues of oppression have a strong interrelation with the history of the land or territory in which individuals reside, such that many groups experience oppression due to a history of colonization within their land which perpetuates the status of those in power (Arredondo, 2008). Hence, while

Mertens and Creswell's frameworks attempt to support the transformative efforts of individuals and groups that experience systematic disadvantages, their epistemological location risks reducing social matters to individualized and decontextualized experiences.

4.1.3 The problem of disconnecting researcher's values

A third tendency that is possible to infer as underlying Mertens and Creswell's frameworks is the emphasis on disconnecting researchers' moral values and political stance from their projects. Allied with the objectivist epistemology of positivism/postpositivism, this axiological position assumes that researchers can study a phenomenon without influencing or being influenced by it (Lincoln, Lynham, & Guba, 2011). In other words, who the researcher is – that is, his/her disciplinary position, social characteristics, political stance, etc. – does not, and should not matter for the process or outcomes of research.

For instance, Creswell's social justice design encourages researchers to select the 'best' worldview (Creswell & Plano Clark, 2011), such as Mertens' social transformative paradigm, for their attempts to improve social justice, thereby implying that a worldview can be chosen for pragmatic reasons as something separate from the researcher. Although Mertens proposes integrating a process of self-reflection into research, there is little or no acknowledgement of researcher's values and political stance regarding social justice in the description of Creswell and Mertens' frameworks. In fact, the emphasis on including a social justice lens throughout the study to ensure its social justice nature (e.g. including groups experiencing marginalization) seems to serve as a catch-all umbrella to deal with the issue of values in research.

Within critical forms of qualitative inquiry, it has increasingly been recognized that researchers consciously and/or unconsciously bring assumptions and perspectives to their research (Bochner, 2000). Within transformative work, such assumptions and perspectives need to be continuously interrogated given that they may at times be at odds with the social justice goals and lens selected for a specific study. For example, researchers' belief systems regarding what is right/healthy/good/just can vary substantially across the globe, which can become problematic when conducting social

justice/transformational research that attempts to be objective and value-free. Researchers may fail to perceive different stances and misunderstand silences, producing what Santos (2014) calls a “sociology of absence” (p. 164) which is structured through the researcher’s values (e.g. what is desirable for a marginalized group). As a result of these variations among value systems, researchers may risk imposing their own worldview onto others and/or causing injustice in one area when trying to promote justice in another because of a lack of critical reflexivity on the value systems they bring into their research (Bailliard, 2016). For example, Creswell and Plano Clark suggest that researchers may “decide how best to refer to and interact with participants” (2011, p. 195) in order to avoid stereotypical labels for participants. To illustrate their point, they provide an example of a mixed methods study of individuals with disabilities (Boland, Daly, & Staines, 2008). In presenting this example, they highlight that interviewers in the qualitative phase used inappropriate language and etiquette related to disability and therefore were given “specific training on the social model of disability, etiquette and language when interviewing clients with disability” (cited in Creswell & Plano Clark, 2011, p. 195). In doing so, this stance implies that researchers are capable of separating their assumptions from the research process through engaging in training, neglecting the multi-layered influences of researchers’ values on how they relate to participants and how these values shape the process of interpretation of individuals with disabilities experiences. This also implies that beyond employing correct techniques (e.g. avoiding stereotypical labeling of participants), there is little concern regarding researchers’ identities, locations, values, and ways of thinking about the population or issue under study which is problematic since it can perpetuate researchers’ uncontested practices. Further, suggesting ‘specific’ training for researchers runs the risk of objectivizing and categorizing the population under study, overlooking the pluralistic ways of being and thinking among participants experiencing similar conditions.

Moreover, from a critical qualitative stance, disconnecting researchers’ values, moral, and political stance from social justice projects can be seen as a disadvantage. For instance, Creswell’s theoretically-based stance does not take into consideration the positionality of the researcher to embrace social transformation or the process of research as a means to increase awareness and change. Rather, it focusses on “recommending

specific changes as a result of the research to improve social justice” (Creswell & Plano Clark, 2011, p. 96) which are assumed to be taken up unproblematically by the population under study. Thus, a focus on outcomes or recommendations rather than considering how populations might interpret and apply these plans for action limit researchers’ abilities to engage in value-added forms of analysis that seek to understand their own posture toward the phenomenon under study as well as the position of people affected by it (Cheek, 2008; Eakin, 2016).

From a critical standpoint it is assumed that the type of knowledge being sought is far from being value-free or universally true, and therefore it is essential to conduct ongoing interrogation of researchers’ moral or political stance and positionality with relation to the research purpose and population under study (e.g. whose side is the researcher on?) (Fine et al., 2003). Thus, we argue that critical reflexivity as an “act of interrogating one’s situatedness in society, history, culture, and how this may shape one’s values, morals, and judgements at both individual and social levels” (Phelan, 2011, p.165) can help researchers to question how they themselves are influenced by dominant discourses that perpetuate marginalization and oppression (Sayer, 2009). In parallel, the concept of social transformation has increasingly been used within critical qualitative inquiry to call for an emancipatory agenda that embraces social justice as both a political and ethical commitment (Denzin & Giardina, 2009; Kincheloe & McLaren, 2005). As such, it is essential to engage in processes of dialogue with those who experience oppression/injustice to avoid imposing our appraisals of what is just or unjust, and collaboratively construct a more socially responsive and justice-oriented research.

4.2 Discussion: Reclaiming the potential of the transformative paradigm

Based on the analysis and three problematics presented above, we propose to promote transformative scholarship by returning to its critical roots as a means to more clearly differentiate transformative scholarship from frameworks that seem to be aligned with positivist/postpositivist assumptions. In particular, we understand critical theory as a paradigm that encompasses a range of diverse theories (e.g. feminist, poststructural, decolonizing, Marxist, queer theory) and positionalities connected through key shared

aspects (Kincheloe & McLaren, 2005). Some scholars (Lincoln et al., 2011) consider all participatory approaches as being part of a distinct paradigm (i.e. Participatory), but we are working with participatory perspectives as part of the critical paradigm.

Although we have highlighted that a key aspect of work embedded within the critical paradigm includes “its commitment to questioning the hidden assumptions and purposes of competing theories and existing forms of practice and responding to situations of oppression and injustice by giving rise to new possibilities” (Farias & Laliberte Rudman, 2016, p. 3), work embedded within this umbrella has been criticized for failing to translate its motivation to actions that enhance social justice (Denzin & Giardina, 2009; Sayer, 2009). Thus, in this section, we provide a brief overview of the limitations and strengths of the participatory and critical traditions when used separately drawing on literature from critical social science, international development and community-based practice. By introducing these limitations and strengths, we advocate, aligned with advancements in critical participatory action research (e.g. Stoudt, Fox, & Fine, 2012; Torre, Fine, Stoudt, & Fox, 2012), for creatively combining critical and participatory traditions and other forms of critical qualitative research as ways to move transformative scholarship into more critically-informed, action-oriented and social justice directions.

4.2.1 An overview of participatory and critical traditions

4.2.1.1 Participatory

The roots of participatory research can be traced to northern and southern traditions (Wallerstein & Duran, 2008). In the global north, the need for participatory inquiry was prompted by events in the 1950s and 1960s related to the civil rights and anti-war student movements in the USA. As such, this northern tradition can also be linked to Lewin’s work on action research and experiential learning (1951), Fals-Borda’s participatory action research (1979), and Skolimowski’s participatory mind (1994). On the other hand, the southern tradition of participatory ways of creating knowledge can be traced to the emergence of pressing social and economic issues in the global south such as the military dictatorships that emerged between 1973 and 1989 in Chile, Argentina, Bolivia, Brazil, Paraguay, and Uruguay. This tradition developed in the south is rooted in Freire’s work

on adult literacy for cultural action (1988), Marxist critics, liberation theology, and a recognition of the colonizing role of research and education within marginalized communities. While it is beyond the scope of this paper to expand on each stream, we recognize their influence on participatory research and how this tradition is continuously evolving and changing into diverse research forms such as Black participatory action research and critical participatory action research from the Public Science Project (Lykes, 2001; Stoudt et al., 2012; Torre, & Ayala, 2009; Torre et al., 2012).

In this section we draw particular attention to Heron and Reason's articulation of participatory because of its great influence on what today is known as participatory inquiry.

Heron and Reason formalized these ideas in 1997, coining the term 'participatory' as the ground for inquiry that involves people's experiential knowledge. In particular, Heron and Reason's vision for a participatory approach started developing during their work on cooperative inquiry, a model designed by Heron in 1968-69 to emphasize a reciprocal relation between people involved in a study. Their vision focused on the process of two or more individuals researching a topic together using a series of cycles in which people explore the world 'from within', moving between their experiential knowledge and the process of reflecting together on it (Heron, 1996; Heron & Reason, 1997). Thus, in terms of strengths, Heron and Reason's participatory framework introduces the possibility of doing research with people, instead of about them. It also presents self-reflection as part of the research process in order for the participants to reach self-awareness as a way to reach human flourishing (Heron, 1996; Heron & Reason, 1997).

Heron and Reason's participatory vision and contemporary participatory research forms have been widely promoted and discussed from the mid-1980s onwards (Neef, 2003). However, after a boom period throughout the 1990s, in recent years increasing criticism of how participatory inquiry, specifically participatory action research (PAR) has been taken up has materialized (e.g. Cooke & Kothari, 2001; Hickey & Mohan, 2004; Masschelein & Quaghebeur, 2006). For instance, similar to concerns raised in our critique of Mertens and Creswell's' frameworks, one forefronted concern is for the use of

PAR as a toolbox disconnected from philosophy and theory. This issue has been related to its increasing reduction to the diagnostic stage of problems and priorities, which in turn has perpetuated an instrumental character and a myth of instant analysis of local knowledge (Cooke & Kothari, 2001). For instance, Cleaver (1999) argues that this instrumentalization of PAR and focus on “getting the techniques right” to ensure the success of such projects, risks the disengagement of participation from its original political motivation (p.36).

Another issue present in the literature is that most participatory research forms pay insufficient attention to the heterogeneity within the groups with whom they work (e.g. gender, age, and social position) and to conflicting interests among them (Lavigne Delville, Sellamna, & Mathieu, 2000). In line with this issue, participatory research forms have been criticized for becoming too focused on the local, failing to connect local issues to broader systems of power relations through which people are disempowered (Hickey & Mohan, 2004; Mohan & Stokke, 2000). Akin to our earlier forefronting of the problematic of individualization, this implies that wider issues related to social conditions (e.g. history of colonialism, institutionalism) that create and maintain marginalization and inequity often are left out in participatory projects. As articulated by Cooke and Kothari (2001), “an emphasis on micro-level of intervention can obscure, and indeed sustain, broader macro-level inequalities and injustices” (p. 14).

4.2.1.2 Critical

Critical work encompasses multiple critical theories that are always evolving, creating a dynamic theoretical space (Kincheloe & McLaren, 2005). These multiple theories are held together ontologically by a view of reality based on power relations that are socially and historically mediated. This struggle for power leads to interactions of privilege and oppression that can be based on, for example, race or ethnicity, socioeconomics, class, gender, mental or physical abilities, religious affiliation, or sexual orientation. Thus, in terms of strengths, critical work facilitates the introduction of issues related to oppression and power to inquiry, and the examination of the root causes of these issues (Cannella & Lincoln, 2009).

Overall, critical work has been largely promoted because of its commitment to questioning and exposing oppressive structures which gives it a potential emancipatory character (Sayer, 1997). However, scholars have pointed out that although critical work is underpinned by an emancipatory motivation, its inconclusive nature can limit its intent to identify inequities and injustices without acting against them (Cannella & Lincoln, 2009; Sayer, 2009). As such, critical work has been criticized for overemphasizing the questioning of reality, risking turning its work into a sort of swamp of interminable criticism and deconstructions (Finlay, 2002; Sayer, 2009).

Furthermore, Bhaskar (1986) and others have argued that since the main problem many times is not finding the cause of oppression but finding alternatives that are less problematic, questioning reality and enabling people to reveal the source of their suffering conditions is not sufficient for generating emancipation. Thus, for many scholars, claims regarding the potential of critical work for social transformation need to be moderated by recognizing that this work often is disconnected from generating feasible alternatives of action (Freire, 2006; ISSC, IDS, & UNESCO; 2016). This issue of applicability cuts to the heart of critical scholars who have been criticized for constructing a society so oppressive that the scope of possible actions tends to shrink into a vanishing point, leaving the issue of social transformation at an ideological rather than practical level (Stirk, 2005).

4.2.2 (Re)engaging transformative scholarship with the critical paradigm

Based on the criticism of the critical and participatory traditions presented above, scholars have started combining these traditions to provide a more fruitful space for advancing transformative scholarship and bringing back an explicit commitment to social justice and political engagement. As such, scholars are drawing on critical theorists such as Freire among others, to integrate a critical analysis of structures of oppression within participatory forms of research to value knowledge that has been historically marginalized, and challenge broader relations of power (e.g. Fine & Torre, 2004; Torre et al., 2012; Stoudt et al., 2012). This movement brings examples of critical PAR as one way to reinvigorate transformative scholarship rooted in notions of democracy and social

justice by engaging with people's experiences to generate a deeper understanding of how locally-situated issues are shaped by broader processes without staying only at an ideological level. Other examples of this work are Fox and Fine (2015) who combine participatory action research and relational approaches to illustrate how the collective production of knowledge through research builds youth leadership capacity.

As such, transformative scholarship provides a space for combining participatory processes in which community partners reflect on their diverse experiences of injustices, and critical examination of the broader social, economic, and political forces that shape these experiences. Further, transformative processes can combine critical examination of local issues in relation to broader social processes to not only point out 'what is not right', but also express a commitment to people's significant knowledge and capacities to (re)negotiate their position within power relations, and design actions that are suitable for their particular context (Cooke & Kothari, 2001; Hickey & Mohan, 2004; Torre et al., 2012). Thus, creative combinations of critical and participatory traditions and other forms of critical qualitative research in conjunction with social transformative goals has the potential to enact research as a social process of gathering people's knowledge to generate actions designed to challenge the status quo. From this combination, transformative scholarship could be (re)configured as an epistemological and methodological space that considers and addresses individual, collective, and local, as well as institutional and structural dimensions.

4.3 Conclusion

In this article, we have examined two models of transformative scholarship. We concluded that while a commitment toward social justice indicates a desire to promote change, relying on positivist/postpositivist assumptions often risks accepting problems as they are dominantly defined, perpetuating individualistic interpretations of injustices, and neglecting the socio-political construction of injustices. As an alternative, we propose to reframe transformative scholarship within the critical paradigm by embracing epistemological values and methodologies that promote a more complex understanding of people's experiences and the conditions that (re)produce injustices.

Although we acknowledge that enacting transformative scholarship is a difficult and complex challenge, particularly in contemporary socio-political contexts that often emphasize methodological ‘prescription’ (Chamberlain, 2000), this paper does not aim to suggest pre-defined ways to do transformative scholarship. Rather, we emphasize how important it is to think about how social justice goals could shape the ways research is conducted (e.g. partnerships, collaboration, knowledge generation, design of action) (Cheek, 2008), and recognize that the implications of transformative scholarship for research and practice entail diverse possibilities. From this perspective, researchers’ values, assumptions and interpretations should become explicit in order to facilitate a deeper understanding and engagement with the value system being put forward in the context they are situated (Fine et al., 2003). Along these lines, it seems essential to (re)connect transformative scholarship to political stances, epistemological standpoints, and social justice goals by taking up inquiry in innovative ways to enact relevant and adaptable projects for specific social settings.

In line with this, embracing transformative scholarship can facilitate recognition of researchers’ moral responsibility and commitment to the very persons and communities with whom they engage. This potential for seeking to work with communities in democratic, inclusive, and respectful ways builds on the two traditions presented in this paper; critical and participatory, and aligns with calls to work toward greater equity in society. Further, such a transformative stance may help those disciplines and researchers embracing a critical intent to seek support for people’s resistance, strengths, and rights to have a say in actions which affect them and claim to generate knowledge about them, thereby disputing conservative perspectives of representation and moving away from an expert position (Denzin & Giardina, 2009; Santos, 2014). Thus, considering the potential of transformative scholarship, we advocate for shifting away from dominant models of scientific, value-free, and positivist inquiry to promote creative ways of bringing together people’s aspirations, political or moral stances, and possibilities for transformation.

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Chapter 5

5 Critical dialogical approach: A methodological direction for occupation-based social transformative work⁸

Occupational therapists and scientists are increasingly promoting an agenda of social reform within occupation-based work, pointing to the potential of addressing socio-political determinants of injustices experienced by particular groups in society. They argue that articulating and enacting this agenda requires the incorporation of diverse epistemological and methodological approaches (Galheigo, 2011; Galvaan & Peters, 2014; Kronenberg, Pollard & Sakellariou, 2011; Malfitano, Lopes, Magalhães & Townsend, 2014; Pollard, Sakellariou & Kronenberg, 2008). However, reaching beyond traditional frameworks informing practices to address social disparities has placed scholars and practitioners at uneasy crossroads (Galheigo, 2011; Farias, Laliberte Rudman & Magalhães, 2016). As articulated by Frank and Zemke “addressing this set of concerns – the unevenness of global wealth, differentials in the protection of human rights and obstacles to the exercise of personal agency and political power – represents an upheaval in thinking and action within the occupational therapy profession” (Frank & Zemke, 2008, p.112). Based on this reality, it is important to build a repertoire of research tools that offer different perspectives and enable action commensurate with social transformative goals. We argue that critical dialogical approaches have the potential to generate reflection among people (e.g. scholars, practitioners, citizens) who want to better understand a topic as a first step to promote change oriented towards social justice (Gómez, Puigvert & Flecha, 2011). Dialogue and reflection can in turn give rise to (new) knowledge about power relations and socio-political conditions specific to the problems people are facing, including actions for improving their situation (Gómez et al., 2011).

Within this article, we draw on our shared experience in employing a critical dialogical approach in a study aiming to inform the advancement of socially useful, critically

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informed and politically responsible occupation-based work. This study, referred to throughout this paper as the example study, employed a critical dialogical research approach to promote occupational therapists and scientists' reflection on their own social transformative practices. In this article, we explicate what a critical dialogical approach is and how it is commensurate with a critical social paradigm and social transformative work. Moreover, we integrate collaborative reflections on the procedures and partnerships developed in the example study, with the intent to offer up these ideas for further dialogue regarding this methodological approach. We hope that this material can help extend the frameworks of research used in occupational therapy and science in order to enact ways of knowing and doing that incorporate dialogue, collaboration and examination of taken-for-granted understandings that shape the on-going development of social transformative work.

For this purpose, this paper is organized in six sections. Within each section we address features of a critical dialogical approach and illustrate our specific research application. To start we present an overview of our example study. The second section introduces the development of a social transformative agenda within occupational therapy and science, highlighting the importance of expanding predominant research frameworks. The third section presents a critical dialogical approach drawing on Freire and Bakhtin's work on dialogue. The fourth section describes critical dialogical methods, specifically dialogical interviews and critical reflexivity. Then, we discuss key considerations when using this approach and methods. We conclude by considering the wider implications of this innovative approach in the context of occupational therapy and science in the social field.

5.1 Overview of the example study

The example study was conducted by the first author as part of her doctoral dissertation, supervised by the second author, and facilitated by the participation of five scholars (the contributing authors that appear in alphabetic order). Study procedures were approved by the appropriate university ethics board. Individuals from different geographical locations publicly known for engaging in social transformative occupation-based work (as a result of publications and presentations) were invited via email to participate. To obtain a multi-layered understanding of participants' projects and how they think about and act in

relation to the challenges and opportunities that arise within their projects, three sessions consisting of in-depth dialogical interviews were conducted. The dialogical sessions lasted between 60-90 minutes and were conducted both in-person and via Skype. To enact critical reflexivity, each participant was invited to engage in a process of critical reflexivity apart from the dialogical sessions. This process entailed sharing the transcripts of the data collected with the participants. All five participants accepted to engage in this process, receiving a copy of their own transcript and a brief critical reflexive document constructed by the first author (6 pages or less) after each session. The document contained quotes drawn from the transcript as well as researcher's critical reflections, notes and questions for the next session.

5.2 A social transformative agenda related to occupation

Although there is no one definition of social transformative work in the occupation-based literature, several examples have implicitly or explicitly been defined as social transformative (Pollard et al., 2008; Laliberte Rudman, 2015; Townsend, 1997; Watson & Swartz, 2004). Within this paper, the term social transformation related to occupation is employed to denote an inter-related theoretical frame and practice approach. As a theoretical frame, social transformation, informed by critical social theories, facilitates processes spanning the continuum of research and practice that place emphasis on power relations and socio-political conditions that extend beyond individuals and shape their occupational possibilities for participating in society (Farias et al., 2016). Such practices involve processes of knowledge construction and action that emerge from collaboration with people who experience varying forms of systematic disadvantages, and that seek to build a more critically engaged society through occupations.

Occupational therapy has long historical roots of involvement in work claiming to optimize social inclusion of persons experiencing challenges to occupational participation (Law, 2002; Meyer, 1922; Wilcock, 1998). However, despite claims regarding occupational therapy's birth in social reform, scholars have argued that an early identification with medical rehabilitation diverted the profession from such social commitments (Frank & Zemke, 2008; Pollard & Sakellariou, 2012; Wilding & Whiteford, 2007). As articulated by Pollard and Sakellariou, "as a clinical practice

concerned with medical conditions the profession was less concerned with the social history of inequality, which contributed to the distribution and experiences of illness and disability. The prescription of interventions for specific conditions is different from the development of practices for social change” (Pollard & Sakellariou, 2012, p.8).

Nevertheless, there is evidence of a growing interest in refining and enacting occupation-based social transformative work within and beyond the health sector. This is apparently influenced by recent socio-political and economic events, such as the social crisis in Europe (van Bruggen, 2014, 2016), climate-related disasters across the globe (Rushford & Thomas, 2015), and the wealth concentration and increasing inequities associated with the global expansion of neoliberalism (Barros, Ghirardi & Lopes, 2005; Sakellariou & Pollard, 2016). As such, calls for developing occupation-based projects within the social field that generate knowledge about and address the socio-political determinants of inequality have materialized from diverse geographical locations (Galheigo, 2011; Malfitano et al., 2014; Pollard et al., 2008; Gerlach, 2015).

Of relevance to the methodological focus of this paper, there have been discussions about the need for ways of thinking and doing within knowledge generation processes that better align with and support social transformative scholarship and practice (Galheigo, 2011; Whiteford & Townsend, 2011). Some examples of this expansion are; the emergence of occupational justice and occupational rights concepts (Hammell, 2008; Wilcock & Townsend, 2000), the incorporation of critical social theories to reconceptualize occupation as a situated political phenomenon (Pollard et al., 2008; Laliberte Rudman, 2015; Galvaan, 2012), and the promotion of collective and partnership approaches to reframe the relationships with the people with whom we work (Kronenberg et al., 2011; Fransen, Pollard, Kantartzis & Viana-Moldes, 2015).

At the same time, the emergence of issues of social transformation, power, and justice in occupation-based literature is not without debate and tensions. A disconnection between the epistemological foundations of occupational therapy and science (what is believed to be true and known), the stated intentions for working towards social transformation (what it is said we do), and the enactment of these foundations in society (what we do in practice) has been forefronted as problematic (Farias et al., 2016; Whiteford &

Townsend, 2011). Farias and colleagues (2016) associate this tension with the epistemological foundations of the profession and discipline which often have bounded the practice and study of occupation within individual-focused approaches and positivist notions of science. Whiteford and Townsend (2011) relate this disconnection to a tendency to rely on biomedical sciences, which have higher status and privilege in institutions and health-related discourses, and have resulted in replacing occupational issues with biological issues in most Western societies (Whiteford & Townsend, 2011; Whiteford & Hocking, 2012).

Several scholars have argued that frameworks such as social transformation belong to a different paradigm than the contemporary positioning of occupational therapy and science within health sciences and biomedicine, fields largely dominated by positivist/post-positivist thinking (Galheigo, 2011; Malfitano et al., 2014; Magalhães, 2012; Pollard & Sakellariou, 2014). Fransen and colleagues (2015) argue that even within an occupational therapy practice that promotes a client-centred approach, there is often a reliance on a functionalist paradigm that tends to be mechanistic. Yet, in practices that aim to be transformative, there is a need for reflecting on why things are done (e.g. what conditions, practices and discourses (re)create injustices) rather than learning how to do (Fransen et al., 2015). As such, critical reflexivity has been promoted to emphasize reflection on the paradigms or set of assumptions underlying the practices that are emerging in response to the calls for promoting social transformation and justice (Galheigo, 2011; Farias et al., 2016; Whiteford & Townsend, 2011; Phelan, 2011). Critical reflexivity is central to the critical dialogical approach forwarded in this paper. It has the potential to engage with social transformative work and critical social theories as means to draw attention to broader social issues that create and sustain injustices, the taken-for-granted assumptions that shape knowledge and practice, and one's positionality within issues of power (Kinsella, 2012; McCorquodale & Kinsella, 2015).

5.3 Dialogical approaches and a critical approach

Dialogical approaches belong to a broad methodological umbrella that encompasses an evolving group of theoretical approaches and positionalities, such as Bakhtin's dialogic imagination (1981), Cavalcante Jr's circles of literacies (1999/2000), Freire's theory of

dialogic action (1970), Spindler and Spindler's cultural theory (1989), Habermas' theory of communicative action (1984), and Wells dialogic inquiry (1999). This diversity makes it difficult to determine the possible applications and defining features of a singular dialogical approach. For example, a dialogical approach can be used as a research method, pedagogical technique, and as an approach to reflexive practice development (Sullivan, 2012). Dialogical approaches can be enacted in the analysis of personal or collective experiences in broader contexts, and for examining relations of power (Poland & Cavalcante, 2010).

Within this diversity, dialogical approaches share some distinctive inclinations. Firstly, dialogical approaches are holistic in the sense that they recognize an interplay among communication/language, context, action, and meaning. Secondly, dialogical approaches view everyday life as embedded within complexity and tensionality, prompting scholars to articulate these tensions and examine how people experience, manage or endure them. Thirdly, dialogical approaches emphasize the centrality of discourse (Barge, 2008). While these distinctions offer a ground for articulating what dialogical approaches might look like, their use of discourse raises some challenges since discourse is often defined in a variety of ways (Alvesson & Karreman, 2000). For example, discourse in linguistic studies has been defined as a medium for social interaction in which the details of language in use and interaction process are central concerns of analysis (Potter & Wetherell, 1987). On the other hand, discourse from a poststructural stance refers to the articulation of ideas in a historically situated time that (re)produce general and enduring systems of power (Foucault, 1976, 1980). Based on this diversity, it is crucial to clarify which philosophical and theoretical framework(s) are used to frame a dialogical approach and which definition of discourse is employed. Thus, rather than outlining all dialogical approaches, in this section we focus on a particular dialogical approach and its theoretical underpinnings, developed as part of the first author's dissertation; a critical dialogical approach.

A critical dialogical approach is grounded in a critical ontological and epistemological position (Guba & Lincoln, 1994). It has the potential to enact a multiplicity of definitions of discourse that are consistent with theories and traditions embedded within a critical

social paradigm. Such definitions emphasize the productive nature of discourse and the ways in which social reality is constructed through discourse embedded within relations of power and political, economic, cultural and other factors (Laliberte Rudman, 2013). While critical social theory encompasses a range of perspectives and positionalities, they share a commitment to responding to situations of power and (in)justice and to expose, illuminate, and/or transform how injustices are socially shaped, perpetuated and enacted (Cannella & Lincoln, 2011; Kincheloe, 2005; Sayer, 1997). Thus, as a central feature, critical dialogical approaches take up a critical intent that aims to address situations of injustice by supporting social transformative efforts that seek to capture the systemic and complex root causes of injustices and increase possibilities for social change (Cannella, Pérez & Pasque, 2015).

More specifically, the theoretical influences that frame the critical dialogical approach employed in the example encompass Freire's theory of dialogical action and teaching (1970) and Bakhtin's dialogic imagination (1981).

Drawing on Freire's approach (1970), dialogue is viewed as a means to engage with processes that seek to (re)invent knowledge, that is, more than the exchange of ideas and knowledge (Shor & Freire, 1987). This focus on (re)inventing knowledge is aligned with social transformative work and a critical intent that seeks to problematize issues from multiple viewpoints to uncover taken-for-granted assumptions and foster (new) knowledge that in turn can advance possibilities for social change (Kincheloe, 2005; Cannella et al., 2015). As such, Freire's approach was used in the example study to promote occupational therapists and scientists' critical reflection on their own experiences enacting social transformative practices/projects. It was expected that engaging in dialogue with scholars and practitioners would elucidate complex challenges emerging in social transformative occupation-based projects, thereby providing knowledge to inform new generations of students and scholars that seek to enact this type of work. From this perspective, dialogue was taken up in ways that would enable scholars and practitioners to engage in processes of raising awareness (also known as conscientization i.e. conscientização in Portuguese) regarding the ways of thinking and

acting in relation to this type work, and explore the influence of contextual forces and professional discourse on their practice/projects. As articulated by Freire,

Dialogue must be understood as something taking part in the very historical nature of human beings. [...] Dialogue is a moment where humans meet to reflect on their reality as they make and remake it. Something else: To the extent that we are communicative beings who communicate to each other as we become more able to transform our reality, we are able to know that we know, which is something more than just knowing. [...] Through dialogue, reflecting together on what we know and don't know, we can then act critically to transform reality. (Shor & Freire, 1987, p.13)

The process of raising awareness regarding practices that attempt to be social transformative aimed to increase knowledge about this type of work and the interpretive frames for action that shape these practices (i.e. praxis) (Freire, 1970). Drawing on Freire, it is understood that people have the potential to (re)think, question, and reflect on their reality through dialogue, becoming aware of their ways of thinking and acting as well as envisioning (new) approaches to social transformation (Freire, 1970).

Another key assumption is that dialogue should emerge from an egalitarian process in which people provide arguments based on knowledge, encompassing both theoretical and practical understandings, and not on power claims (Freire, 1970). This assumption prevents dialogue from being mistaken for a conversation that can end up in an over-celebration of one's own location (e.g. power, status, privilege) which in turn can obscure the possibility of engaging with the object of knowledge in the first place (Freire, 1970). For instance, in the example study we examined the ways in which participants think (e.g. beliefs, assumptions, discourses, stated intentions) and act regarding the nature of their projects, as well as the challenges and opportunities related to the development of these projects. In this case, participants could have used the study to celebrate their achievements, expertise and knowledge, or in contrast the researcher could have taken control over the study and stated her power over the direction and development of the data. Rather, the form of each dialogical session was instead complemented by a process

of critical reflexivity in which each individual involved in the study respectfully challenged the other's assumptions and positionalities, avoiding engagement in one-way communication or a situation where one person would act on another (see more in the critical dialogical methods section). This approach was important given that good intentions of egalitarian dialogue between researchers and participants do not break with the power relations presented in the research, and therefore there is a need to plan and enact processes that work to maintain constant awareness of relations of power. As Gómez and colleagues point out "not only do researchers and subjects need to be willing to engage in egalitarian dialogue to assure that their interactions remain egalitarian but also do they need alternative structures and norms and a particular approach for organizing the research process that ensures greater equality" (2011, p.239).

This commitment to egalitarian dialogue was also evident in the way the relationships between researcher and participants were fostered. In addition to being a means for reflecting, examining and envisioning new possibilities for action, dialogue was used as a bridge between the types of knowledge present in the study. On the one hand, there was participants' tacit knowledge, experience, and expertise about occupation-based social transformative work, and on the other the assumptions, professional discourses and theoretical frameworks that shape their practices. In this sense, dialogue provided a space for the interaction of diverse forms of knowledge without prioritizing one over the other.

In line with Freire's conceptualization of dialogue, the study also draws on Bakhtin's dialogic imagination (1981). Bakhtin, as well as Freire, supports the notion of dialogue as an egalitarian process and assumes that ideas, far from being abstract, are full of social constructions and assumptions that reflect the social (Bakhtin, 1981). Based on these assumptions, Bakhtin brings attention to the role of ideology (i.e. dominant social and/or professional expectations and ideals) in the shaping of the ideas exchanged by dialogue (Bakhtin, 1981; Frank, 2005). As such, ideas exchanged are seen as formed in a continuing process of social interactions and expectations whereby they are shaped as well as they shape the ideas/assumptions of others (Frank, 2005). For example, in the study it was assumed that participants' ideas regarding social transformation and their practices were informed by their experiences in the field as well as professional

discourses regarding occupation and social transformative work. Participants' ideas were in this sense taken up as being shaped by their contexts and professional background.

An essential feature of Bakhtin's work is the notion of dialogue and discourse as productive agents of everyday social life. This implies that people's expressions of their ideas constantly (re)produce discourse (i.e. system of ideas, attitudes, beliefs and practices) that construct the realities of which they speak (Sisto, 2015). As such, discourse is viewed not only as abstract structures but as a flow of expectations, assumptions and meanings governed by a set of conditions (e.g. social, historical, cultural) that can be contested (Bakhtin, 1981). For example, discourses related to the notion of independence/dependence in rehabilitation sciences reflect systems of ideas, beliefs and expectations that tend to prioritize independence as a source of freedom, self-determination, choice and control, which in contemporary Western contexts reproduce neoliberal notions of 'good' citizens (Gibson, 2016). These ideas also shape the notion of dependence by attributing it to moral values largely imbued with stigma, such as lack of willpower, laziness or personal deficiency. As such, the concept of discourse in dialogical research can promote critical reflection on the meanings and beliefs expressed through dialogue to recognize how certain discourses (re)produce the social imaginary that marginalizes, stigmatizes, and/or suppresses alternative ways of doing (Santos, Nunes & Meneses, 2007).

A classic example of how discourses of independence/dependence shape people's possibilities of doing is the way in which rehabilitation frameworks tend to classify people as 'dependent' in the sense of being incomplete and/or requiring amelioration, when indeed they are in need of various forms of physical, technological and/or human assistance to carry out their daily activities. This discourse has been contested in the literature of occupational therapy and science and disabilities studies (Hammell, 2009; Kirby, 2015; Morris, 2004) by challenging the idea of dependence and reconfiguring its meaning in ways that make dependencies inherent to the human condition (Gibson, 2016).

Given the productive nature of discourse and its implications for what comes to be marked or understood as acceptable and unacceptable ways of doing and being, it is essential to dialogically examine the professional/disciplinary discourses that shape occupation-based social transformative processes in order to understand and reveal the implications for ways of doing and being enacted and promoted through such work. For example, in the study, the idea of social transformation was challenged by suggesting that within the dominant neoliberal context, these practices can run the risk of reinforcing discrimination whilst still waving the banner of social justice. Another idea discussed is related to the dangers inherent to a disconnection of practice from theory or vice versa that can result in a sacrifice of intellectual reflection or ‘thoughtless action’, and/or a sacrifice of action ‘actionless thought’ (Freire, 1970).

5.4 Critical dialogical methods

Critical dialogical methods encompass a range of research methods, including traditional (e.g., observations, interviews, focus groups), visual (e.g. blogs, photovoice, art installations), art-based (e.g. dance, theatre) and lyrical methods (e.g. poetry, songs). In all instances, methods are used to generate data to examine people’s assumptions and ways of thinking embedded in discourse to reveal the broader relations of power operating within sociohistorical contexts. Moreover, these methods seek to examine the ways in which these power relations influence how situations are socially constructed, including possibilities for action for varying actors within these situations. In this section, we will focus on the methods used in the example study; dialogical interviews and critical reflexivity.

5.4.1 Dialogical interviews

In keeping with a critical lens and goals of social transformation, dialogical interviews aim to understand complex and taken-for-granted situations, beliefs and practices (Knight & Saunders, 1999) that interact with and shape individuals’ situated practices. To stimulate engaged dialogue, this type of interview seeks to be egalitarian and flexible, allowing exploration of issues perceived by the researcher and participants as important and that affect the personal and/or professional interests of both parties (Knight &

Saunders, 1999; Oakley, 1981; Woods, 1986). Therefore, to avoid creating an interrogation or one-way interview, this type of data collection requires that those involved are seen as egalitarian partners, having a perceived parity of knowledge and/or experience (Freire, 1970). From a critical paradigm, working towards the ideal of egalitarian dialogue involves researchers and participants sharing responsibility in making sense of their experiences and assumptions and the power relations that exist before and during the study; the more active the individuals can be in this process, the more in-depth their exploration of analysis of reality will be (Freire, 1970). Thus, in contrast to neglecting power relations, dialogical interviews provide space for deliberately recognizing how power plays a role in the researcher-participant relationship, promoting democratic interactions with participants throughout the research process (see more in the discussion section, democratization of the interview process).

To stimulate in-depth exploration of a topic and to provide a space for each individual's account, dialogical interviews are loosely structured (Bogdan & Biklen, 2007; Wengraf, 2001). In the example study, this meant that the researcher developed an interview guide consisting of overarching questions for the first session and potential open-ended prompts for the second and third session. Examples of open-ended overarching questions used in the first session are: Could you tell me about the types of projects that you are or have been involved in? Could you tell me about the transformative nature of your project? What kind of challenges/tensions have you encountered trying to initiate/develop these types of project?

The flexible format allowed for variations in the second and third session from participant to participant depending on the issues that surfaced in the first session. These variations opened possibilities for enhancing the understanding of how each participant thinks and acts in relation to their work, without trying to classify or generalize their experiences, and kept the focus on how power relations and contextual factors influence their practices. The overall focus of these following sessions was on gaining an in-depth understanding of the issues raised by each participant, provoking unpacking of professional discourses that may conflict in their practice. For example, some questions were directed towards enhancing the understanding of how participants negotiate

required resources for their projects (e.g. funding, a place for conducting the project), and/or how they sustain their efforts after leaving the context of practice. Additionally, in the third session the participants were invited to envision new possibilities or approaches for advancing occupation-based social transformative work, drawing on their experiences and critical reflections. This act of envisioning is based on Freire's notion that the integration of imagination in dialogue is crucial to link people's realities and reflections, which can result in alternative approaches and actions (Shor & Freire, 1987).

Thus, in line with the dialogical nature of the method, the researcher drew on what was being told during the sessions to ask questions that explored participants' contextual reality making it possible for both the participants and researcher to recognize the interaction between the various components that shape their practice (Bakhtin, 1981; Freire, 1970). The exploration of participants' contextual reality is essential from a critical stance since it allows drawing attention to broader social issues that (re)create boundaries, as well as raises awareness about how practices are grounded in professional and sociohistorical processes.

5.4.2 Critical reflexivity

Critical reflexivity is a form of reflection that involves moving beyond reflection to question the processes by which professional discourses and knowledge that shape practice are constructed (Kinsella & Whiteford, 2009). This makes critical reflexivity a valuable tool for not only addressing the symptoms but also the root causes of injustices, as well as the role of occupation within the hegemonic social order. In addition, it can open spaces for diverse worldviews and help actors to remain vigilant of potentially enacting colonial agendas and a 'saviour complex'.

To enact critical reflexivity, transcripts and the researcher's critical reflections were shared with participants. The purpose of sharing these documents was to encourage participants to be critically reflexive regarding ideas exchanged in each dialogical session, to challenge the interpretations and assumptions of the researcher, and to build on these reflections through dialogue in the following sessions.

5.4.2.1 Transcripts

The practice of inviting participants to review their interview transcripts has been used in qualitative research predominantly as “a process whereby interviewees are provided with verbatim transcripts of their interviews for the purposes of verifying accuracy, correcting errors or inaccuracies and providing clarifications” (Hagens, Dobrow & Chafe, 2009, p.9). In contrast to approaches for validating research findings, such as member checking (Lincoln & Guba, 1985), triangulation (Creswell, 1998; Denzin, 1978) or for verifying accuracy (Hagens et al., 2009), in the study we focused on sharing transcripts with participants to enhance collaboration and critical reflexivity throughout the research process. Collaboration aligns with a critical social paradigm because the intent of the process is to respect and support participants in a study, building the participant’s view into the study (Creswell & Miller, 2000). Based on this assumption, participants were encouraged to feel free to not only edit transcripts but also to add additional insights or clarifications. Although participants interacted differently with their transcripts, all participants made grammatical changes, corrected errors/omissions and/or added minor clarifications, and the majority added comments to the transcripts in an apparent effort to offer new insights or further articulate points made during the session. Indeed, as showed in Figure 2, participants’ clarifications deepened the data by providing more thoughtful and time-considered statements around key points.

that person might not be able to clothe that child properly because is about resources, you know. That child should be at school, you know. But what are they getting out of school, because they don’t actually speak the language and the school has yet to make accommodations for these children, so ... so there can be all those kinds of issues which are going to stand in the way of a collaboration. If I’ve got a uniform or if I’ve got ... you know, if was practising ... I suppose I would look like an OT. You know, I’ve got the pair of jeans and a pair of sandals on. And I’ve got a, sort of, computer briefcase. And I get out of my car, walk into your house,



This point might not be very clear. What I am saying is that there are codes of dress which professionals use when they are dressing down which are to do with what their employers find acceptable, and what they imagine to be fairly neutral and comfortable - but they are still professional middle class dressing down kind of clothes so it is obvious that they are mental health professionals

And what I think is quite a difficult concept, is this client-centeredness. For always they defend it that the client wants this. Yes – yeah, my child also wants to have a lolly and a sweet, but ... Yes, I have to convince her that things are better not to take and yeah, that there are alternatives. So how do you learn people really to choose?



How can people make occupational choices not only for themselves but which are beneficiary also for society?

Figure 2. Extract from two different transcripts with participants' comments.

Although some scholars have expressed concern that sharing transcripts increases the risk that participants will add numerous new and substantive comments that make the

transcript no longer accurately reflect the verbal exchange during the interview (Hagens et al., 2009), we drew on critical and dialogical perspectives that emphasize processes of transformation, (re)invention and critique (Guba & Lincoln, 2005). Thus, from this standpoint, sharing transcripts is seen as one valuable option for promoting critical reflexivity, collaboration, and co-creation of the research agenda.

5.4.2.2 Critical reflections

The researcher's critical reflections were shared with participants to stimulate their process of critical reflexivity regarding issues emerging in the data, as well as to add another opportunity for discussion to the process (Harvey, 2015). The process of developing the critical reflective notes usually began during the dialogical sessions. With consent, the researcher took hand-written field notes for all sessions to document her own thoughts, as well as to draft questions for upcoming sessions. Following the sessions, the researcher focused her writing on her assumptions regarding issues surfacing during each dialogical session to contrast her experience/knowledge with participants' experiences/knowledge and try out her understandings of the ideas that had been exchanged. As such, each critical reflexive document was different since it was based on each participant's level of engagement in the sessions and with the documents sent to them. The following is an example of the researcher's critical reflections based on one part of a dialogical session.

Similarly, I found it very interesting what you said about "*the conflict trying to work in a health system for people who didn't fit*" (p.1). As I reflect on what it is that we are promoting in OT, it seems that our positioning within the health system or rehabilitation field has made us part of a large discourse that promotes 'helping people become as normal as possible' implicitly trying to fix individuals (e.g. make them fit into a society) instead of helping societies to embrace diversity and other ways of being and doing in the world (e.g. other ways of moving, doing with different types of support). Thus, I wonder if the tensions that you experienced were related to the way a medical approach aims to 'fit' people into society or if there was something else that produced the tensions?

Figure 3. Extract from researcher's critical reflections of one dialogical session.

Although all participants expressed deep involvement with the documents shared with them, different participants engaged with the documents for different periods of time and

in different ways; for example, some participants focused on clarifying their position while others added links to relevant literature that would expand ideas shared in the session, and/or inserted their own reflections and questions into the critical reflective document using the Word processor feature track changes. For example, the following participants engaged in active discussions with the researcher, inserting comments and challenging the researcher's assumptions.

I associate this biomedical approach with a strong reliance on positivist perspectives (e.g. we usually measure child development using measures that stem from normal distribution curve) that embraces 'normality' as the only way of being, perpetuating the gap between 'them and us'. This tendency to valorise normality has also provided us power and a position to judge who is able and disabled, a focus aligned with the biomedical model (i.e. emphasis on biology, pathology and the scientific method) that focuses on 'broken bodies', perpetuating a notion of disability as a tragedy that provides us with a 'job' that involves helping people to come 'back to normal' or 'as normal as possible'. In that sense, it can be said that OT contributes to social exclusion of people with disabilities by objectivizing their bodies/body functions as 'things' that need to be fixed. Although there have been calls to shift this focus from deviance or abnormality

Similarly, you raised an important aspect of occupation related to its temporality (nowadays limited to Western conceptualization of time and space). *"So there isn't a beginning point, really, and there isn't an end point, because it's a continuous process. Social action doesn't ... you know, history doesn't stop and it doesn't start either. You know, it merges (p.2). Start to recount things. And it may well be that it has to be as fluid as that, that when we look back at what we've done we might not understand everything about the context. We may not understand our purpose very well"* (p. 2). In this sense, occupation related to social actions and transformative processes could embrace other conceptualizations of time, for example to understand that social change takes time, maybe generations, and that processes are fluid and do not always have a clear beginning or end. Am I capturing that idea or did you mean something else?



For me the OTs have left probably this idea of normality, but they make real participation often not possible, they work still too much on functionality and do not consider enough the structures/systems and the bigger environment (Social determinants of health) which caused the disability.



That's right. Occupational ideas have to take better account of historical as well as personal and community narrative process, but also the problems of historical perspective which are about how we perceive history through different lenses and interpret it in different ways - it makes no sense to consider history as a 'science' although this will be a point that some may argue. History is partisan. As we know from the southern experience of occupational therapy the history of occupational therapy itself is that it is an instrument of policy, a bit player in a larger game of colonial influence, cold war politics, which conferred a mixture of benefits and medicalised perspectives. A possible example may be given in Joubert's (2010) exploration of OT in apartheid south Africa, although I suspect there might be more of a story to tell there.

Figure 4. Extract from researcher's critical reflections with two participants' comments.

5.5 Discussion

Drawing on the challenges and opportunities that emerged in the example study, this section presents an overview of key elements to consider when conducting a critical dialogical study. It is worth mentioning that specific considerations might vary and depend on the particularities of each project.

5.5.1 Democratization of the interview process

Research interviews are often presented as one-directional questioning where the role of the researcher is to ask questions and the role of the participants is to answer those questions guided by their preconceptions regarding the study/questions which assist them in making choices about what to share (Kvale & Brinkmann, 2009). In this sense, interviews are distinctive and atypical speech events infused with social expectations

heavily focused on participants' articulation of their experiences (Jones, Bunce, Evans, Gibbs & Ricketts, 2008). Further, interviews in qualitative inquiry can vary significantly depending on the different paradigms and traditions that underlie the research (Karnieli-Miller, Strier & Pessach, 2009). Thus, even though interviews in qualitative research presuppose to reduce power differentials and encourage disclosure and authenticity between researchers and participants, the relationship and distribution of power between them can vary. This suggests that "participants are not always considered to be the real experts" (Karnieli-Miller et al., 2009, p.281); an assumption that can create a division of roles between researcher and participant as dichotomous, predetermined and/or mutually exclusive. As such, interviews can sometimes become a means for instrumentalization of the conversation taking place, that is, a means for providing researchers with descriptions and personal experiences to interpret and report according to their research interests or agenda (Kvale & Brinkmann, 2009).

The possibility and risk inherent in maintaining dichotomous roles is that this separation provides power and control to the researcher, which in turn affects the type of data collected (Karnieli-Miller et al., 2009). For example, if the role of the researcher is to be a neutral recipient that does not disclose her/his intentions during the interview process, such an asymmetrical power relation can dissuade participants from articulating personal thoughts or expressing their opinions freely (Jones et al., 2008). For this reason, it is essential that researchers draw on critical theories to reflect on power relations, control and positionality when conducting dialogical interviews. Thus, dialogical interviews are based on the belief that power differential often emerges from the uneven social positionality of participants and researchers, recognizing that most of the power when conducting research lies in the hands of the researcher who poses the research project, sets the agenda, initiates and defines the interview situation and the topics, poses the questions, decides which answers to follow up, and terminates the interview (Kvale & Brinkmann, 2009; Karnieli-Miller et al., 2009). This means that although dialogical interviews seek to create a two-way dialogue to democratize the process in which the data is constructed, it does not mean that dialogue is seen as completely egalitarian or free of power asymmetries. Instead, a critical dialogical approach advocates for revealing those

power differentials and attempting to compensate for them through consensus, empathy and respect.

In the case of the example study, there was a perceived parity regarding the professional/disciplinary background of those involved (i.e. occupational science and/or occupational therapy), but there was a knowledge and status imbalance between the researcher conducting the data collection and the participants who had a higher academic status and/or extensive experience than the researcher. To compensate for this imbalance, the interviewer drew on her theoretical knowledge regarding the topic under study to bring in issues that came up in her doctoral work to promote discussion of issues that did not explicitly surface in the sessions. At all times, the researcher embraced a transparency framework (Karnieli-Miller et al., 2009) regarding her research agenda, being mindful of participants' potential motivations so that they could take control of some parts of the dialogical session and clearly benefit from taking part in the study. Likewise, since the study aimed to gather theoretical and practical knowledge gained throughout participants' expertise and years of professional training/practice, it was essential for the development of the study to build a respectful relationship between researcher and the participants. This meant that the study would analyse the participants' experiences to learn and find other alternatives for action but not seek to expose their 'dirty laundry' (Karnieli-Miller et al., 2009).

Some examples of actions undertaken by the researcher to enact democracy, transparency and respect throughout the study were: booking time with each participant who asked to have an opportunity to ask questions regarding the research process, revealing researchers' thoughts and reflections regarding data when asked and through reflexive notes, and including the questions that participants brought up in the dialogical sessions. This meant that the researcher needed to have some flexibility for rescheduling the session, and allocate extra time for reviewing participants' comments and having discussions with participants regarding the particularities of the study; expectations of participation, and participant responsibilities and rights throughout the research process. These discussions served as a place to recognize the power differentials between researchers and participants and possibilities for counterbalancing those imbalances.

5.5.2 Data ownership and control

Since researchers have reported various issues related to confusion and conflicts between researchers and participants, ownership and control of data are seen as crucial elements of qualitative research that required careful consideration (Jahnke & Asher, 2012; Lin, 2009). Conflicts regarding control and ownership offer a few glimpses into how sometimes even in qualitative research, data is seen as separated from the participants, conferring absolute control and power to the researcher who becomes the main storyteller, and who recasts participants' accounts into a new historical, political, and cultural context (Karnieli-Miller et al., 2009).

The assumption that researchers have full ownership and control over the data collected has the inherent risk of converting participants' accounts into 'the researcher monopoly of interpretation' (Kvale & Brinkmann, 2009; Karnieli-Miller et al., 2009). To mitigate this risk, critical dialogical studies are based on the notion that both participants and researchers have rights (e.g. to own and edit data) and obligations with respect to the information shared (e.g. engaging with the data) (Freire, 1970). As data is seen as a result of shared effort between all those involved and not a replication of participants' or researchers' opinions, the assumption that power lies in the hands of the researcher, who possesses the data, is challenged (Freire, 1970).

In the example study, attempts were made to share data ownership and control.

Participants were given a copy of all their transcripts so that they would own the material and use it in ways that would benefit them (e.g. further their own reflections and practice, use them in their academic writing and teaching). In this sense, participants' ownership of data influenced their level of interaction with the transcripts and researcher's critical reflections, which in turn resulted in participants gaining greater control over the research process since they had the possibility to check and edit the transcripts to protect their interest, influence data collection, express their concerns, and challenge the researcher's reflections. It is worth noting that the process of sharing transcripts and other documents with participants required extra time and effort. The process of (re)reading transcripts can be both lengthy and cumbersome, and although participation in these processes is voluntary, participants who wish to take part may be negatively impacted by the time and

effort required (Hagens et al., 2009). Additionally, participants' literacy levels, capabilities, and computer and/or email access were considered beforehand. Although this was not a factor for the participants in the study, the process of sharing transcripts and other documents may require extra time or support if the participants had diverse literacy levels, capabilities and/or access to technology.

5.5.3 Relationships and levels of partnership

Relationships between researchers and participants can vary from a high level of partnership in which there is a strong loyalty and commitment to participants, to a highly differentiated/dichotomous and asymmetric level of partnership (Karnieli-Miller et al., 2009). In this continuum, we argue that dialogical studies should seek high levels of partnership while acknowledging that power always will be present in researcher-participant' interactions. As such, it is essential that researchers reflect on the power relations that exist before, during and after a study is conducted, and how power affects the nature of partnership. Per this position, the researcher's task is to use her/his expertise, skills, experience, and ethical commitment to develop a strong partnership and commitment to participants and their interests, including possibilities for participant involvement throughout the study. Undoubtedly, while the ways in which researchers plan to involve participants in the co-construction of data and analysis might vary, there should be explicit intentions of sharing responsibilities with participants so that their opinions regarding the development and directions of the study become a constant presence (Karnieli-Miller et al., 2009).

In the example study, the theoretical frameworks and methods chosen were designed to enhance the relationships between the researcher and participants by offering a less hierarchical and more reciprocal, transparent agenda. For instance, before the example study started, transparency was enacted by communicating participants about the impossibility of guaranteeing full anonymity. Due to the public nature of the participants' work, their visibility as experts in the social field, and the study's critical emphasis on the situatedness of their experience/practice, it was not possible to guarantee their anonymity. However, steps were taken to, in the extent possible, support the confidentiality of the data that participants shared, such as through removing names from transcripts and

critical reflections. Nevertheless, maintaining anonymity in manuscripts where quotes are used was a challenge since others could potentially identify the responses of the participants if these contained specific information regarding their projects. To minimize that risk, preliminary findings and manuscript drafts were also shared with participants so that they could decide if their anonymity was at risk or if they preferred to connect their individual experiences with their responses (i.e. disclosing their identity). Indeed, the option to waive anonymity is one that should be open for discussion in a dialogical project given the role of participants, for example, as potential co-authors, and the purposes for which they may want to have their contributions identified. As such, these steps directly and/or indirectly facilitated the development of respectful relationships based on mutual trust and an acknowledgement of one's equal right to information regarding all aspects of the study.

5.6 Final considerations

In enacting a social transformative agenda, scholars and practitioners require different and more egalitarian and reflexive ways of thinking and acting. However, for these ways to be enacted, they have to be acquired through professional education and research training. This requires shifting away from educational approaches and research frameworks that provide mechanisms that maintain an expert status and practitioner/participant distance, such as, for example, frameworks of practices and guidelines that delineate how and what types of problems are to be identified (Pollard & Sakellariou, 2012; Hammell, 2006). At the same time, the construction of occupation-based knowledge and research has also created parameters and opportunities for re-envisioning the role of practitioners and scholars (Farias et al., 2016; Laliberte Rudman et al., 2008). Capturing social transformative processes has proven to be difficult, especially because of the way that the profession and discipline has defined research by biomedical terms (Whiteford & Townsend, 2011). Consequently, there is a need for radical openness by problematizing the established ways of thinking about and studying occupation to promote different alternatives for advancing occupation-based social transformative work.

Based on our shared experience employing a critical dialogical approach, we argue that a critical dialogical approach has the potential for supporting transformative processes by creating spaces where dichotomous roles can be challenged, diverse types of knowledges can interact without privileging one or another, and what has come to be taken-for-granted can be critically attended to. Despite practical challenges of employing this methodological approach, its theoretical foundations support its use for enacting egalitarian processes amongst participants by promoting values such as transparency and democratization of the process. It is worth noting that the example study is only one possible application of this methodology, which means that several modifications can be made to enact dialogical processes in different contexts and with diverse groups. For example, the number of sessions used in the example study was determined by the first author's dissertation timeline. Given that dialogue and critical reflection are ideally long-lasting collaborative processes, it is recommended that future studies explore mechanism to enable on-going dialogue.

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Chapter 6

6 Examining occupation-based social transformative practices using a critical dialogical approach

With the increasing acknowledgment of the importance of opening up the canon of occupation-based knowledge to reflect the different needs of diverse contexts across the world (Hammell, 2011; Iwama, 2007; Wright St-Clair & Whiteford, 2005), an awareness of how socio-historical and political conditions shape occupation and practice has also materialized (Pollard, Sakellariou & Kronenberg, 2008; Laliberte Rudman, 2015). This awareness has not only opened up space for thinking about occupation as a site for the reproduction of inequality (Angell, 2012), but also taken up an early notion of occupation as a site for political action and social change (Dickie & Frank, 1996; Townsend, 1997; Watson & Swartz, 2004). In doing so, the potential of occupation for social transformation, and thereby the potential of occupation-based practices to work toward justice has prompted dialogue regarding the social responsibility of occupational therapy and science (Frank, 2012; Galheigo, 2011; Sakellariou & Pollard, 2013). Most significantly it has stimulated global discussion about situations where occupation is constrained due to social and structural causes, and “what can be done about this to bring about change” (Sakellariou & Pollard, 2017, p.2).

Furthering this imperative for mobilizing the transformative potential of occupation to address occupational injustices, diverse proposals have emerged from around the world linking occupation-based practices to contemporary social, political and economic conditions (Guajardo, Kronenberg, Ramugondo, 2015). Although these efforts have been described as part of a growing international movement (e.g. Kronenberg, Pollard, & Sakellariou, 2011; Sakellariou & Pollard, 2017), they reflect long-standing traditions of participatory and community work existing somewhat at the margins of dominant perspectives in occupational therapy. For example, stimulated by socio-historical challenges such as colonization processes, dictatorial regimes, and large economic disparities and inequalities, South America has a long history of occupational therapy practices related to social movements (Dos Santos, 2017). In Brazil, publications on occupational therapy focusing on social issues can be traced back to the 1970s (Barros,

Ghirardi, Lopes, & Galheigo, 2011), although linguistic barriers have impeded the sharing of these experiences worldwide. Indeed, it was not until the mid-2000s that a group of Brazilian authors first published in English on ‘social occupational therapy’ (Barros, Ghirardi & Lopes, 2005), a term used to denote practice that serves people lacking the social and economic resources to live, guided by a critical reflexive approach and critical perspectives such as Freire and Gramsci’s work (Malfitano, Lopes, Magalhães & Townsend, 2014).

The necessity of developing such transformative practices has more recently been linked to a steep rise and spread of neoliberalism that has led to the aggravation of the vulnerability of groups and individuals in the context of increasingly privatizing States and degradation of social protection systems (Lopes & Malfitano, 2017). In this context, efforts such the Metuia project emerged in Brazil to practice in the context where people live and where politics, economic and cultural aspects shape their lives (Malfitano et al., 2014). This example of social occupational therapy seeks to understand the macrosocial elements that influence subjects’ participation in social life in both collective and individual ways. Some actions undertaken by this project are: working together with public governmental and non-governmental organizations to support the universalization of citizenship rights, and advocating against the sexual exploitation of children and young (Lopes & Malfitano, 2017).

Similarly, authors from South America and South Africa proposed the term ‘Southern occupational therapies’ to challenge the notion of a universal occupational therapy, and the apparent consensus regarding its theoretical and epistemological underpinnings (Dos Santos, 2017; Guajardo et al., 2015). These authors argue for rethinking occupational therapy knowledge and practices to avoid being complicit in processes of exclusion and perpetuating ahistorical and individualistic views of occupation. In addition, by positioning the profession within social transformation they emphasise the need for a commitment to act alongside people in situations of social exclusion (Guajardo et al., 2015). As an example of this rethinking of professional knowledge and practice, Galvaan and Peters (2013) proposed an occupation-based community development framework to inform practices that challenge and address the social conditions that limit people’s

participation in occupation. Applied to community occupational therapy, this framework promotes enhanced understanding of how inequities are a result of power differentials and their impact on people's health, well-being and participation (Galvaan & Peters, 2017).

In parallel, authors from North America and Europe have offered political and social ideas to reorient practices toward issues of justice and power. For example, Townsend proposed the concept of occupational justice to explicitly engage with the socio-political forces that restrict the right to occupation (Townsend, & Wilcock, 2004). Hammell (2008) argued for the need to address issues of marginalization and access to occupation through social transformation. Likewise, in Europe, projects like ELSiTO (Empowerment Learning for Social Inclusion through occupation) began during the economic crisis of 2008 to work in partnership with persons from vulnerable social groups toward social inclusion (Bogeas et al., 2017). Some of these proposals, among others, have been described in more detail in several publications such as the book series of Occupational Therapy without Borders (see Kronenberg, Simo, & Pollard, 2005; Kronenberg et al., 2011; Sakellariou & Pollard, 2017). While it is beyond the scope of this paper to expand on each of these examples, the author acknowledges that there are other efforts being developed across the world where occupational therapists are working toward a critical positioning regarding citizenship, political freedom, and economic and social issues. Hence, while these examples do not encompass this diversity, they echo a broader call for recognition, sharing and discussion of these practices to develop appropriate ways to address contextual forces and their consequences in people's lives (Sakellariou & Pollard, 2017).

Although occupation-based transformative practices are increasingly shared and discussed within diverse regions, they are often not valued or understood in institutions such as education or healthcare (Hammell, 2013; Pollard et al., 2008). Several authors have argued that this situation is partly due to the epistemological foundations of the profession and discipline which often have bounded the practice and study of occupation within positivist notions of knowledge, science and progress (Farias, Laliberte Rudman & Magalhães, 2016; Hocking, 2012; Magalhães, 2012). As such, the practical and

experiential knowledge of occupational therapists working alongside people for social causes have historically afforded lower status compared to hegemonic scientific knowledge within the profession (Guajardo et al., 2015; Sakellariou & Pollard, 2017). Parallel to this contention, although occupational therapy education often emphasizes holistic approaches and social responsibility, when enacting these ideals, the profession seems constrained by its positioning within broader contextual forces that constantly pull the profession toward a focus on the individual (Gerlach et al., 2017).

Consequently, social transformative practices and knowledge have been hard to claim within the profession and discipline (Laliberte Rudman, 2017). Thus, it seems essential to create spaces for breaking out of the boundaries that promote neutrality and a particular mode of practice, and the sharing of different ways of thinking and doing occupation-based practices aligned with social transformative goals. From this standpoint, the aim of this study is to promote critical dialogue about how occupation-based social transformative work is understood by individuals who are attempting to enact it, and how it is shaped by discourses and other contextual features that contradict or challenge the ideals underlying these practices. The research questions include: How is occupation-based social transformative practice conceptualized (e.g. assumptions, characteristics)? What are the stated intentions that frame the development of projects related to social transformation and justice? How do these intentions relate to broader discourses and contextual factors at play within occupational therapy and science as well as within the broader contextual reality that shape participants' practices?

6.1 Methodology and analytic framework

6.1.1 Methodology

The approach employed in this study combines a critical stance grounded in critical ontology and epistemology (Guba & Lincoln, 1994) with a dialogical approach based on the work of Freire (1970) and Bakhtin (1981). Dialogical approaches belong to a broad methodological umbrella that encompasses an evolving group of theoretical approaches and positionalities. Within this diversity, dialogical approaches share some distinctive inclinations. First, dialogical approaches recognize an interplay between

communication/language, context, action, and meaning. Second, dialogical approaches view everyday life as embedded within complexity and tensionality, prompting scholars to articulate these tensions and examine how people experience, manage and/or endure them. Third, dialogical approaches emphasize the centrality of discourse (Barge, 2008), defined as a flow of expectations, assumptions and meanings governed by social, historical and cultural conditions that shape people's realities.

A critical stance frames this critical dialogical approach within a range of perspectives and positionalities that share a commitment to addressing situations of injustice by supporting social transformative efforts that seek to capture the complex root causes of injustices and increase possibilities for social change (Kincheloe & McLaren, 2005; Sayer, 1997). As such, this stance emphasizes the productive nature of discourse and the ways in which social reality and practices are constructed through discourse embedded within relations of power and other contextual factors (e.g. political, economic).

Drawing on Freire's theory of dialogical action and teaching (1970) and Bakhtin's dialogic imagination (1981), ideas exchanged by dialogue are viewed as far from being abstract, and instead as imbued within broader discursive constructions and assumptions that reflect the social. This implies that dialogue is seen as a productive agent of everyday life and that people's expressions of their ideas constantly (re)produce or contest discourse (i.e. systems of ideas, attitudes, beliefs and practices) through dialogue.

6.1.2 Analytical framework

As a theory-informed methodology, the critical dialogical approach employed in the study is grounded in Santos's Epistemologies of the South approach (2014) and Freire's work (1970), both aligned with social emancipatory and decolonizing intentions. These approaches were adopted to illuminate dominant ways of thinking and acting that frame practices and social issues in certain ways while neglecting or silencing other alternatives. Applying a notion of dialogue as embedded within larger discourses, Freire and Santos's approaches facilitate the deconstruction of taken-for-granted notions and beliefs that interact with and shape individual's situated practices. As such, practices are viewed as shaped by a set of conditions (e.g. social, historical, cultural, professional) that

can (re)produce the social imaginary that marginalizes and/or suppresses alternative ways of doing, thereby creating tensions with social transformative goals. Thus, in relation to this study's objective, these theoretical frameworks enabled the examination of how social discourses, professional assumptions and expectations, and other contextual forces are directly implicated in shaping the ways that social transformation practices are being constructed and negotiated.

By problematizing what is dominant, Santos (2014) proposes to open the canon of knowledge imposed by modern science, colonialism, and capitalism, to knowledge and practices that had been resisted, contested or neglected. This deconstruction can raise awareness of the dangers of granting absolute priority to a single universal epistemology or way of thinking and the implications for what comes to be marked or understood as acceptable and unacceptable ways of doing and being. Thus, in assuming that reality cannot be reduced to what has been privileged or produced as valid, Santos' approach (2014) supports the objective of this study by guiding the analysis in ways that elucidate transformative practices for which dominant traditions might not make sense and the conditions that challenge these practices.

Along with Santos, Freire (1970) assumes the existence of elites that benefit from capitalism and others systems that create privilege and disadvantage. As such, Freire proposes that systems of oppression act by submitting their ethnocentric knowledge to the world which is then internalized by individuals as the only legitimate knowledge that is available to them. To illustrate the processes of silencing other ways of being and thinking (e.g. indigenous populations, women, elderly's knowledge) as a direct result of economic, social, and political domination by which unprivileged groups are governed, Freire describes this phenomenon as the 'culture of silence'. Based on this view of reality, a key concept of Freire's work is 'conscientization', defined as the process of developing a critical awareness of people's social reality through collective dialogue, reflection and action. As neoliberal rationalities have spread, processes of critical awareness and reflection provide ways of revealing political aspects of knowledge and reality production, emphasizing the potential of people to realize how certain discourses stigmatize and/or make invisible alternative ways of doing and thinking. Thus, through

dialogue, this study aimed to engage with individuals working in what could be viewed as at the margins of dominant frames of occupational therapy, to reflect on how dominant rationalities create tensions with social transformative ideals, and how these tensions are understood and negotiated among the participants.

6.2 Method

6.2.1 Participants

Ten potential participants known for engaging in occupation-based social transformative work (based on publicly available information, project websites, publications, and presentations) were invited via email to participate. To ensure the inclusion of individuals from diverse geographical areas widely known for engaging in this type of practice, the selection was conducted in close discussion amongst the researcher, supervisor and advisory committee members. In addition to this initial selection, the inclusion criteria for the participants were: a) agreeing with the researcher's identification of them as knowledgeable, b) being able and willing to explore their experiences developing occupation-based social transformative work, c) being 18 years of age or older, and d) having English or Spanish as a first or second language. Of the ten invited potential participants; six have English as a first language and four as a second language (e.g. first languages; Portuguese, Spanish, German and Dutch).

All ten potential participants answered the invitation via email; eight answered within the first weeks and two answered after several months when the data collection was ending and therefore the researcher was unable to include them in the study. Of the eight participants that answered the invitation within the first weeks, two did not answer the second email that included the informed consent form, and one did not contact the researcher after having a discussion via Skype regarding the study procedures. Therefore, the researcher was unable to include these three participants in the study.

The five participants taking part in the study have been involved in occupation-based social transformative practices for various amount of time, between 10 and 30 years, practicing in places such as Africa, South-Asia, Eastern-Europe, Germany, UK, and South America. Their work encompasses projects within the areas of occupational

therapy education, community development, social occupational therapy, adult literacy, and poverty reduction. Currently all participants work within occupational therapy higher education in different capacities; three in full-time positions, and two in part-time positions (e.g. supervising students' fieldwork, leading specific courses or giving lectures). Of the five participants, four were working with diverse governmental and non-governmental associations and community centers in social transformative practices at the time of the interviews. Study procedures were approved by the appropriate university ethics board, and all participants gave their informed consent prior to the interviews. To protect confidentiality, letters of the alphabet are used to present participants' quotes.

While the sample size of the study (five participants) could be considered small, it is well-known that samples for qualitative studies are generally much smaller than those used in quantitative studies because of diverse reasons (Mason, 2010). One of them is that qualitative research is concerned with the detailed nature of the experiences and meanings shared by the participants, and not in generalizing hypothesis (Crouch & Mckenzie, 2006). To ensure achievement of in-depth data, the design of this study allowed for developing a strong partnership and commitment to participants and their interests, including possibilities for participant involvement throughout the study (see description of data collection methods). In addition, the data collection methods allowed for sharing responsibilities with participants (e.g. answering to transcripts and researcher's critical reflection documents) and thereby engaging in processes of dialogue and reflection that enabled the sharing of rich, in-depth and sufficient data to answer the research questions.

6.2.2 Data collection

In line with a critical dialogical approach, data was gathered using dialogical interviews and a process of critical reflexivity (Kinsella & Whiteford, 2009). These methods are briefly described below.

Three dialogical interviews were conducted with each participant to understand complex and taken-for-granted situations, beliefs and practices that interact with and shape individuals situated practices (Knight & Saunders, 1999). To stimulate engaged dialogue,

this type of interview seeks to be flexible, allowing for exploration of issues perceived by the researcher and participants as important and that affect the personal and/or professional interests of both parties (Knight & Saunders, 1999; Oakley, 1981). This meant that the interviews were loosely structured (Bogdan & Biklen, 2007) using an interview guide consisting of overarching questions for the first session and potential open-ended prompts for the second and third session. Examples of questions used in the first session were: Could you tell me about the types of projects that you are or have been involved in? Could you tell me about the transformative nature of your projects? What kind of challenges have you encountered trying to initiate/develop these types of projects? Depending on the issues that surfaced in the first session, this flexible format allowed for variations from participant to participant in the second and third session. These variations opened up possibilities for enhancing understanding of how each participant thinks and acts in relation to their work, without classifying or generalizing their experiences, and kept the focus on how power relations and contextual factors influence and are negotiated in their practices.

The dialogical sessions lasted between 60-90 minutes and were conducted in English, both in-person and via Skype depending on participant location. To avoid creating an interrogation or one-way interview, the researcher took the position of an egalitarian partner throughout the process (Freire, 1970). Thus, in contrast to neglecting power relations, the researcher promoted democratic interactions and adopted a transparency approach (Karnieli-Miller, Strier & Pessach, 2009) to deliberately recognize how power plays a role in the researcher-participant relationship. Some examples of actions undertaken by the researcher to enact transparency and democracy throughout the study were; booking time with each participant who had questions regarding the research process, revealing researchers' thoughts regarding data when asked and through critical reflexive notes, and including the questions that participants brought up in the subsequent sessions.

To stimulate critical reflexivity, participants were invited to engage in a process of responding to transcripts and researcher's critical reflections. All five participants accepted to engage in this process, receiving a copy of their own transcript and a brief

critical reflexive document (6 pages or less) written by the researcher after each session. The purpose of sharing these documents was to encourage participants to be critically reflexive regarding ideas exchanged in each dialogical session, to challenge the interpretations and assumptions of the researcher, and to build on these reflections through dialogue in the following sessions. Each critical reflexive document contained quotes drawn from the transcripts as well as researcher's reflections and questions for the next session. The process of employing dialogical interviews and critical reflexivity in this study is described in another article (Farias et al., submitted).

6.2.3 Data analysis

A critical discourse analysis (CDA) was conducted, drawing together material from dialogical interviews and critical reflexive documents in a recursive and non-linear process (Ballinger & Cheek, 2006; Cheek, 2004; Laliberte Rudman, 2013). This is a systematic scholarly process, grounded in the study's research questions, theoretical framework, and methodology (Phillips & Hardy, 2002). As such, based on Santos and Freire's work, an important focus of the data analysis was attending to how discourse and other contextual features were drawn into the dialogue to frame practices and social issues. In particular, points of contradiction or tension between such features and participants' constructions of occupation-based social transformative practices were deconstructed.

An analysis sheet was constructed to integrate the research questions and theoretical underpinnings of the study in the process (Jäger & Maier, 2009). The analysis sheet contained questions grounded in Santos and Freire's approaches and was applied to bring attention to the social meanings, power relations and discourses embedded in the data (Phillips & Hardy, 2002; Wodak & Meyer, 2009). To begin the analysis, each text was read several times, accompanied by free note writing. This note writing, rather than trying to find answers, attended to the possibility that something interesting was embedded within a text that could be related to the research questions (Wood & Kroger, 2000). Then, using the analysis sheet, a theory-informed reading was conducted to add a critical lens to the analysis. Following the theory-informed reading, a cross-text analysis within each participant's data was conducted where the texts were read 'against' each other,

focusing on similarities/connections, contradictions, and repetitions. Subsequently, a cross-text analysis between participants was conducted, starting by contrasting the data set of two participants and adding the data set of one participant at a time until all five participants were included. The discursive threads identified by the cycles of analysis were contrasted with the data sources several times to (re)consider their links, and confirm their relevance to the foci of the study.

There is no established singular quality criterion for CDA (Wodak & Meyer, 2009). Thus, scholars emphasize the importance of explicitly articulating the theoretical approaches used in the analysis as well as the choices made and the positionality of the researcher (Ballinger & Cheek, 2006; Laliberte Rudman & Dennhardt, 2015). In line with these considerations, Pozzebon and colleagues' dialogical principles (2014) were used to address quality issues (e.g. criticality, reflexivity, and authenticity). For example, to ensure criticality, a process of critical reflexivity was conducted with the participants to problematize the dominant ways of thinking and acting within which their practices are situated. Reflexivity was also conducted by the researcher to critically scrutinize her positionality as well as the interpersonal and value-laden nature of the social, cultural, and political meanings produced by the study. In addition, peer-reflexivity was conducted between the researcher and her supervisor by examining the process of data collection methods, data analysis and the research process itself. Likewise, a long interaction process with the participants was promoted to increase the authenticity of the researcher's interpretations. This period involved three dialogical sessions conducted two to four weeks apart to allow time for the researcher to review the data collected after each session and write the critical reflexive documents. The time in-between dialogical sessions allowed participants to review their transcripts and respond to the critical reflexive documents. This dialogical process took between six to eight months to complete with each participant. Additionally, the participants were involved in the process of writing a manuscript with the researcher which extended their interaction by two to three months.

6.3 Findings

Commensurate with a critical standpoint that emphasizes subject positionality and the existence of multiple ways of viewing reality (Ballinger & Cheek, 2006; Wodak & Meyer, 2009), the findings offer one possible reading of the data sources. As such, the researcher's positionality and theoretical understanding were used to deconstruct participants' individual experiences enacting social transformative projects, seeking to address the situatedness of participants' efforts within larger discourses and structures. First, to draw attention to the ideal features identified for this type of practices, a discursive understanding of participants' constructions of occupation-based social transformative practices is outlined. Subsequently, three major discursive threads are outlined, illustrating tensions with social transformative ideals and the ways these discursive threads are understood, negotiated or resisted by the participants. Within the discussion, these discursive threads are situated within broader discourses and contextual features.

6.3.1 Constructions of ideal occupation-based social transformative practices

A key emphasis in the participants' articulations of what distinguishes social transformative work was a commitment to understanding and disrupting the broader systems and mechanisms that extend beyond individuals' control and cause injustices. As one example, participant A emphasized the need to attend to macro-structural elements:

It is important to show the bigger picture, to show the reality. And if you don't work in a macro-structure, the work is not complete. Something we plan to teach students the need for working with macro-structures, policies, to work in a collective way because if you work just with the individual, it's not possible to understand - why can't you do the work?

Participant B also referred to the macro-level, tying this to attending to power and to critical theory underpinnings:

For me definitely has that social aspect, social transformation as in changes at the macro level [...] for me social transformation cannot be done looking only at the situation of an individual. It's because of that postulate and critical theory, sort of that society and power structures and representations have an influence on the individual's experience.

Yet, the participants also emphasized the idea that working at one level of action (e.g. only addressing individual needs or macro-level structures) will probably not result in social transformation. Rather, they proposed that social transformative processes need to involve those involved in perpetuating oppressive practices; from individual/community actors to social/structures. Participant E spoke to students about the need to move from individual to neighborhood level:

They always had to explore who is working in that area, for instance, elderly or refugees, where can you make connections, what are the people themselves missing? [...] And involve – so it should never be this group of homeless or the group of refugees. Then, you look in the neighborhood. What resources are there, more? Do they want to collaborate?

Participant C also addressed the need to span a continuum, from individual lives to political systems:

From my perspective, social transformation needs to happen across that whole continuum. They are real people, with real lives. And I can't ignore that and just say, oh, I'm just going to work, you know, on the political, sort of, system. Because I think you lose sight of what this is really all about and what the lived experience of this level of vulnerability and discrimination is.

In a similar manner, participant A stated, “We try to talk about these all the time - what kind of actions we can do in the micro and the macro level because they should be together.”

Consistent with a critical intent to question the status quo (Kincheloe & McLaren, 2005), participants also stressed that social transformative practices must question ‘why things

are not right as they are' when attempting to enact these practices: "There's no point in going down that road if you're going to look at it in a way that's going to leave things as they are, unless that really is the best way of working things" (Participant D). Participant E added that it is not enough that people recognize that things are not right, they must also make it visible so that others can recognize it too: "So where can we find, as a neighborhood, how can we express, first of all, that others also will recognize this is not right. We have no chances; we cannot do any work."

Also, consistent with critical theoretical underpinnings (Kincheloe & McLaren, 2005; Sayer, 1997), definitions of ideal social transformative practices were offered up by the participants highlighting the importance of promoting critical awareness/examination of the positionality of themselves and their students within issues of power. For example, participant B connected such critical awareness of the self to her situatedness in relation to power:

It is about power dynamics, and then really with the roots in critical thinking. For example, the idea - how is my own awareness of something created in a certain power structure? How do I – what is my own role, how do I see that, how do others see me, why is that the case, and does it need to be like that?

In describing transformative practices outside Western contexts, participant C also spoke about this awareness in relation to power as well as history:

We're really conscious that when you come from outside... We do have a legacy as Western people, potentially coming with some funding or some opportunities [...] you can bring the experience of local people, of, so that is coming up and bringing those people – being able to give them a voice, or be an advocate for them in the first instance, because we will have credibility and we can say what they're saying. That's the power. You know? To their local authorities or politicians so this Western person's saying it, whereas their local people are saying it and are getting mown down or put in prison or ignored. It is a lot around power.

In relation to this critical awareness, participants described the various ways they enacted such processes in their projects. For example, participant D referred to the way a Freirean approach can be used to problematize reality based on people's knowledge and experience:

So in terms of an approach or an informed theoretical approach to transformational practice, then probably that kind of thing is the sort of Freirean aspect of the school's act at grass roots level of culturalization of discussing things in a social way [...] I thought that's something that's really important in terms of putting those people who are out the grass roots of society as being expert in some way about the social conditions that determines health.

In addition, participant B described her efforts using Bourdieu's concepts to raise students' awareness regarding their positionality before participating in community projects:

I think it helps to sort of instrumentalize Bourdieu's approach on habitus or social venues, because my university is a university of applied sciences, and the students predominately have a typical middle-class background. And I think those students who are sort of off and below or above that middle-class background, they really try to adapt to that [...] And if you use Bourdieu for example, then I think it's helpful that the students understand their own habitus both from their upbringing and then in their position as a student, that this means that you have certain preferences and you have a certain perspective in how you react to other people. And that's a very important aspect when you talk about, what is an issue in society and why.

Participant A referred to this process of awareness, describing how social transformation also can take the form of social and cultural capital gains for participants in a project:

I think, you know, we are not able to transform their realities because of the economy, so they are in the same economic place but we can change their

knowledge about the world, their social and cultural capital, their mobility in the city and that is important.

Another feature of social transformative practices perceived as ideal by the participants is the need for promoting relationships of mutual trust and partnerships across different groups in society. For example, participant C emphasized the importance of promoting trust and respect by understanding everyone's experiences, values, and expertise:

We all respected and valued the experience and the perspectives and the expertise that we brought to the team and to that project. I look back on there and I think that really was quite remarkable and it's something that kind of came together in a less structured way [...] we also spent time really understanding what our various values as well as our professional expertise that we brought to the team. So there was a lot of trust and respect and discussion.

Participant B also referred to the importance of promoting relationships of mutual trust to achieve common goals:

And what I've learned from the most difficult projects also is that the nature of the relationships that are built in the project is absolutely crucial. If the relationships don't work, I think the project is not really satisfactory [...] And I mean, in this case, it was lucky because it was still early enough for them[students] to make an effort and change that, but you know if a project goes too far and you have not been able to establish the relationships that are really needed to build trust and to think about what do we want to achieve together, then that is very unsatisfactory.

In a similar manner, participant E added that it is not enough to promote partnerships among those interested in or affected by an issue, but to include those in power:

Often we work with the victims and we don't direct the other ones who made these victims. I always say for also in poverty-reducing, I always say please work with those who are poor, but also with those who are rich, otherwise we are not going to achieve anything.

Emphasis was also placed on recognizing potential barriers to building idealized, inclusive and diverse partnerships, and the strategies that participants used to mitigate these barriers. Participant B referred to the importance of developing relationships to overcome potential misunderstandings and prejudgments between people of different ages (e.g. elderly volunteers and young students):

And just sort of sometimes having gardening as a common occupation only gets you so far because I think you have a lot of underlying misunderstandings with self-images and prejudices, and I think you really need to create the space for people to have relationships [...] if I think of the elderly people with the raised garden bed, I think for them... they were really afraid of not being respected and acknowledged. And they just realized, you know, because the students just came, asked for their opinion, and then they all started to work together. That gave them security, sort of that the students are not so different.

In relation to this gardening project, participant B described a strategy used to develop inclusive relationships between diverse groups:

You should really try to keep such meetings open because very often you do have people who can help others to understand a little bit. So for example that you don't just offer one meeting with information and you have one interpreter, but that you really work with many different languages and many interpreters at the same time even though it's harder for the students to organize that and to be focused and it's a longer meeting. But that way it's more open to people, that it's not just addressed to one group.

Similarly, participant D referred to a specific strategy used in a literacy-related project to clarify any potential misunderstandings:

The sort of stuff that we were doing in packet was – had a word watcher. So the most difficulty understanding things, it was the word watcher. Any complicated word, they put their hand and said, 'I don't understand that word'. Because if they didn't put their hand up, somebody else would just sit there and not reveal they

didn't understand it. So it's a very important role. It means that things move very, very, slowly but everybody understands what's going on. But not everybody can tolerate that because it slows things down too much. So these things have to be navigated quite carefully.

Further, some participants emphasized the need for understanding that 'we are not alone' working toward social transformation and that these practices should be developed in collaboration with other disciplines and social movements:

But of course, we are not alone. We have services there, psychologist, social science assistants, teachers and health professionals. We are not thinking isolated, but we are - in the same time, we are trying to think what kind of contribution the professional therapist adds in this kind of practice (Participant A).

I feel that an occupational therapy or occupational practice for social transformation should be something which is a grassroots concept. In other words, the concept doesn't necessarily have to belong to any one profession. But it needs to be developed so that it becomes a kind of practice, or sort of, process that you can use [...] which is developed in concert with disability movements, disability activists, that's developed in concert with maybe other clinical disciplines and social disciplines (Participant D).

As a final note, it is worth observing that these practices are referred to by most participants as 'occupation-based social transformative practices'. The addition of the words occupation-based and practices signalizes the centrality of an occupational lens in participants' projects, as well as the plurality of possible practices that can be enacted in this field.

I think we are different from social workers, from community workers, really, by this occupational lens; we look so much more from, what people do, that it is really unique. But we have to use it in the right way (Participant E).

So maybe that ... what we can do is just ... at this stage, in our department, is introduce the concept of occupation more widely as the basis for which people

can work some kind of equitable ... a more convivial strategy for social transformation altogether [...] So it becomes almost, like, a sort of broader political process which is ... it's a way of understanding how we work our lives out together (Participant D).

In the next section, three major discursive threads that address forces that work against participants' construction of ideal social practices are described. These threads emphasize how discourses frame certain ways of doing as legitimate, shaping occupation and the way occupation-based practices should be conducted by: a) individualizing occupation, social issues, and responsibilities, b) prioritizing health and taking up a biomedical approach to understanding issues, and c) maintaining professional power, status, and accountability. The tensions created by each thread and how participants attempted to strategize in relation to them are also described.

6.3.2 Individualizing occupation, social issues and responsibilities

The conceptualization of occupation within occupational therapy and science has been criticized for a historical tendency toward keeping the individual at the center of the analysis and intervention (Dickie et al., 2006; Hammell, 2015; Laliberte Rudman, 2013). Participants identified this tendency as a tension when trying to orient their practices toward social needs and structural causes: "Many people said social change – well, in many cases it's remained very individualistic. It can start from an individual person, of course, that's no problem, but has remained so near what we have" (Participant E). "I think you can't start and stay on the individual level, because then that relationship between individual and society, in my understanding, would be missing or wouldn't be addressed" (Participant B).

Participant D also addressed this individualistic tendency, referring to the need for other ways of thinking and doing practice that would better address social needs:

Occupational therapy has been pretty much defined as working with individuals, but what people or society needs is something that has to do with different ways

of managing things, having a sense of collective responsibility that at the moments have been related to citizenship.

This long-standing focus on the individual was further described by most participants as a way of thinking and acting situated within contemporary socio-political contexts, aligned with a neoliberal agenda that perpetuates the idea that participation in occupations is a matter of individual choice, willingness or personal responsibility. Participant B connected this individual focus with a neoliberal emphasis on people's abilities or capacity to overcome their situation:

This neoliberal discourse about civil society and volunteering, being very much informed by an understanding of people can be active, people can help themselves and be responsible for all sorts of things; amongst others, their own health and healthcare and health promotion. And I think what need to be really more talked about is the fact that some people simply don't have the capacity to get active, to choose certain occupations or to get active with certain occupations in the same way that many others can.

In referring to the notion of individual choice, participant D also spoke to the problem of assuming that people 'get into trouble' because of personal deficiencies or lifestyle choices, disregarding structural causes:

I've got some experience in that there are people who are very capable but not quite capable enough to live independently and get into a hell of a lot trouble or has the potential to get into a lot of trouble because they're not quite in the system.

Along these lines, participants described the individualistic notion or belief that "every individual person can forge their own good luck" (participant B) as working against social transformative practices since it neglects the contextual forces beyond the individual that support or deprive people of occupational possibilities. "There are people who have not the right to do certain occupations, so make people aware [of the factors that influence their situation]" (participant E). As such, most participants commented on

how individualistic understandings of occupation promoted by the profession and discipline, and situated within broader socio-political contexts that also emphasize such individualistic understandings, contribute to the construction of moral judgments that focus on individual behavior in terms of what the individual should or shouldn't do.

These preconceived understandings of what a person can or cannot do in a situation, should or should do, it's just not always appropriate and realistic and respectful. And that doesn't go together with understandings of social transformation (participant B).

They [students] immediately like to be the one who says, 'Yeah, you must do this, that, that's very unhealthy. You must not live like that'. So yeah, it's really difficult to change that (participant E).

To resist these professional assumptions and tendencies toward individualizing occupation, participants described their efforts for raising students' critical awareness of their positionalities within social structures and power relations. For example, participant B described how important it is to critically reflect with students on their understandings of what is right/wrong and examine from where these assumptions originate:

It's important for the students to really critical reflect on where they come from themselves [...] So very often I think that is an underlying current, sort of this understanding, if I exaggerate, 'What is our point of view about what's the right action or the wrong action?'

Participant C connected this critical awareness to the need for students to be exposed to social realities different from their own:

Doing this kind of work, it really is something that is a little bit more embedded in terms of social awareness [...] you know, [students] their exposure and their awareness and their influences, their social...their social awareness about what's going on, you know, is very much more – very conventional and inward looking and so forth. So I find that to be frustrating at times. So trying to expose people to the wider world, and using those kind of world scenarios.

Participants also shared stories that illustrate how an individualistic stance is problematic when developing social transformative practices since it can place the cause of social problems onto individuals' behavior, skills or choices, thereby individualizing social issues. Participant E referred to this situation by describing other people's projects related to social transformation:

Well, this was about women who drink a lot – they described very well how that comes, from history and structures, and then what they do is, well, we teach people not to drink and to do occupations. But that is still not focusing also on the structures. So then they are still in this environment what is forcing them more or less to drink.

Based on participant E's story, this individualization of social issues can risk exploring issues only in relation to the group who experiences them, potentially blaming the group for what seems to be the problem, rather than working in ways that illuminate how their social and physical environment might be structured to (re)create harmful occupations. Participant E added that although there may be an analysis of structural causes, individualization seems to keep the focus on responsabilizing individuals for 'their problems':

So, you see the whole process and it is good and they start and they do different things and they have analysed it very well, but just that other step, how do we change now also the structure, where it is coming from and how they can change that [...] Even also as a group, but often still too much as a problem of this group – of the victims.

Similarly, an individualization of responsibility becomes problematic when people internalize this mindset as legitimate since it promotes changing individual actions as solutions to social problems, making collective action unnecessary. In turn, individualization of social issues reduces social change to something individuals can do on their own, based on their choices and personal interests, obscuring the need for social movements and/or making it difficult to join others as part of a team. Participant B described this tension when observing that people were changing groups/projects based

on personal interests (e.g. personal differences, affinity, different interests), failing to realise the potential of working together to transform their situation:

I think that's the big topic that it seems to become more difficult for people to really deal with each other and stand each other because you have so many choices. So if you don't like one group or if you have some problems in one group, then very often you can move on to another group. And I think this is something that I see in the City District in various groups, that sometimes projects just fall apart because people can't stand each other anymore.

The potential internalization of an individualistic mindset has also challenged participants' practices since they cannot expect to work toward social change if people view social problems as individual responsibilities. To challenge individualism, most participants have incorporated processes of critical awareness to acknowledge the larger connections between people's situation and structural causes. "Well, this action of getting people aware, why do I drink? Not because I'm depressive; where is this all coming from? Go deeper, go further. Yeah, that is a long process" (participant E).

This critical look at occupational opportunities offered to individuals on the basis of their situation or position in society [...] Sort of this looking at an individual person's occupational needs, occupational possibilities, and then also taking into account the larger context, macro level if you like (participant B).

As another ramification of an individualistic stance, participants shared stories that exemplify how social transformative ideals are challenged by the notion that problems are caused by the actions of individuals, and thereby solutions should focus on changing individuals' behavior, skills or lifestyles. As illustrated by participant C:

So this idea that people can be fixed. That we go out there and we fix people [...] I work with students and they have this evidence-based practice and more biomedical kind of courses and so they're coming in and talking about, 'Well we're going to generate solutions for this community issue or this community

problem' and I'm thinking mmm. Put the brakes on it, you know? It's like this thing around fixing.

Similarly, participant B described how this tendency for 'fixing' the individual can risk imposing occupational therapists' assumptions of what the problem is and what the solutions should be, 'giving people solutions' without understanding the position of people affected by it and/or taking into consideration their knowledge about the situation:

I think another danger is that very often you can't activate people if they feel that the idea or the initiative has been brought in from the outside. So even if it may very well be their own issue, I think it has a positive impact on how projects take on if people don't feel that they have been given a task and now you're waiting to see how they will perform or what they will do about it.

6.3.3 Prioritizing health and taking up a biomedical approach to understanding issues

Historically embedded within the occupation-based literature is the assumption that a positive link exists between occupation and health and well-being (Stewart, Fischer, Hirji, & Davis, 2016). This belief has been used to guide the development of the profession since its origins, supporting its primary positioning within health care systems (Polatajko, Backman, et al., 2013). While there is a body of evidence that supports occupation's potential for health promotion (Stewart et al., 2016), participants shared concerns regarding a prioritization of health as an ultimate outcome within the profession and discipline. As one example, participant B described this prioritization of health as difficult to resist in societies where health is also framed as a valuable and desirable terrain for social projects:

Even if you look at such a wonderful book as Ann Wilcock's *Occupation for Health*, I mean that's a really good social agenda for occupation at an early point in time, but it's occupation for health. I mean it's the justification. Healthcare, I mean health is considered to be a very valuable good in our society. And health is a big justice issue, but again, of course, it reinforces that focus on health [...] And I think that is because a lot of that discourse is really still with the aim of health.

Based on this participant's description, it seems that aligning social transformative practices to health can risk using health as a justification for addressing social issues, yet keeping the focus on health instead of addressing the structural causes of injustices.

Along these lines, a prioritization of health within social transformative practices is problematic since it can limit the exploration of occupation outside the realm of health and well-being. Participant B referred to this limitation and the need to look at occupation itself:

I just realized why there has been such a big reluctant is because I think the dominant discourse in OT, and I would also say in OS, has been on health and wellbeing. Even with a lot of social field examples, a lot has been about wellbeing. Fair enough, but of course that makes it harder to think outside the box and say, 'Let's just look at occupations for the sake of them being occupations and not as a means towards health and wellbeing'.

In alignment with a prioritizing of health within the profession and discipline, biomedical understandings of health associated with the body and disease have come to be dominant despite a stated commitment to holistic notions of health (Malfitano et al., 2014; Pollard et al., 2008). Participants shared how this view of health from a biomedical lens provoked tensions with the ideals of social transformative practices that seek to move beyond the realm of health associated to the presence/lack of illness. For example, participant A associated the centrality of a biomedical lens in occupational therapy education to barriers for students to move from individual understandings to collective approaches:

Because all the education, we learn about diseases, about techniques, one person from a clinic methodological approach and when we talk about the community, it's more difficult because then you need to do something in a collective way, not in an individual way and collective is not the same.

Participant E added that it is not about the biomedical model itself, but about its appropriateness for occupational therapy, and the potential of the profession to address population's needs:

I have actually nothing against a biomedical model, but I don't think it is very much fitting for occupational therapy. We cannot do much, we cannot cure anybody, so that doesn't make for me much sense. Secondly, I don't believe that we ever can treat everybody individually. We are such a small profession, so if – and we can do much more when we think of populations or communities and it makes much more impact.

Within biomedicine, health professionals have strived to position themselves as leaders or experts on the process of curing or alleviating disease, which in turn has perpetuated their power as the authority to treat and care for others (Iriart, Franco & Merhy, 2011). As one example, participant C emphasized the need for changing this mindset in order to work for social transformation:

It does require a mental head shift because you're not the big expert, you're not the white coat with the expertise giving people – this is what you know saying got a hand injury or a head injury or whatever, this is the recipe, you know? You cannot deliver the outcome that you want. But in this case, you have to work in a different way, and we do need to learn how to do that as OTs.

Along these lines, the allocation of power to health professionals in biomedicine is problematic for social transformative practices that seek to work with people, instead for them. “I don't want to give services. I want to work with, so they need the ownership” (participant E).

Further, in the context of biomedicalization within neoliberal contexts, health has been framed as a valuable commodity/service, failing to meet holistic concerns for human beings (Conrad, 2007; Kearney-Nunnery, 2016). This understanding of health care promotes a sharp division between the therapist and people (provider/consumer) that fails to acknowledge common issues and needs for everyone in society. As articulated by Participant D:

We're talking about neoliberal perspective of consumers or is that the assumption is very often underneath that. If we're talking about a patient, we're talking about

a definite divide between the patient and the therapist. But in some of these experiences I've had, that distinction would be a luxury, hasn't always been there. And I think that kind of aspect of challenging some of those boundaries is an important thing.

Based on participant D's comment, this biomedical understanding of health as a commodity that can be obtained/prescribed can create tensions with social transformative practice since it risks positioning individuals as primarily consumers in society rather than citizens that can work together to change broader social conditions that influence their health.

An understanding of health from a biomedical stance also risks focusing on health at an individual level, placing emphasis on bodily processes and functions, and provoking tensions with the social or collective orientation of social transformative practices that aim to examine health from a broader social lens related to systems and structures. As an example, participant A emphasized the need to attend to social attributes that influence health such as gender and power:

If you are in the social field, you need to think of other things. Not the disease or disability but the social class, the gender, the power and the other dimensions. And there needs to dialogue with the social sciences in our dimension.

Participant E also referred to this broader social lens, linking health to inequality and social determinants of health to draw attention to the factors outside the body, and beyond individuals' control that affect health:

The whole society is so unhealthy, and it gets more and more. And to me it is all inequality and work inequality, income, and housing and - and we can do far better than address the social determinants of health as changing this person who is the victim of that system. So if we are not going to look at the systems... What's the point?

As a strategy to resist prioritizing health within biomedical approaches, most participants defined occupation-based social transformative practices as located 'outside the health

system' or in the 'social field' to expand the scope of their practices beyond health as associated to individual experiences of illness.

I think in any professional therapy, the big essential is to explain that when we talk about social professional therapy we are talking about a connection with the social field [...]. We are saying we would like to expand, to go to another field beyond the health system (Participant A).

I thought [gardening project] it's perfect if you want to take seriously that – the idea of occupation as a human right, and occupation as something that can have an influence in the social field because that really didn't have anything whatsoever to do with the cooperation group that has healthcare issues. I mean, of course, we can always see it from a health promotion perspective, getting active, and having a nice environment that does something good for your health as well. But it was first and foremost really taking OT approaches out of the normal OT context, and just doing something that was focused on the occupation of gardening, and with the idea changing the environment (Participant B).

6.3.4 Maintaining professional power, status, and accountability

Occupational therapy has strived to position itself as a profession, characterized by autonomy, status, and accountability. As such, the profession has attempted to identify a definable knowledge base and gain control over a specialized area of work, thereby developing a clear idea of where the profession's boundaries lie (Mackey, 2007). Yet, the professional strategies employed to exercise autonomy and accountability have been criticized for promoting the profession's self-interest and power, neglecting the possibilities for developing collaborative relationships of mutual respect and equality with the people with whom we work (Hammell, 2013).

In referring to strategies that sustain the profession's power and status, most participants described an increasing demand for homogenization of practices through standards and regulations as opposing to the flexible nature of social transformative work. For example,

participant E linked this demand to the importation of traditional models of education and standards to places where these might not make sense:

The bad thing was there was already an OT school, and that also opened my eyes too. OT school was made by Americans and they had an adapted kitchen. Nobody, of course, nobody from the bush has anything, so this was such a nonsense [...] I like the Americans and it's good, but they say we need to have the minimum standard. And I said standards, standards, well I don't believe in world standards. Yes, a kind of thinking maybe, but not standards, so many hours for this and so many for that and for that.

Participant C shared a story that illustrates how regulations that seek to homogenize occupational therapy training do not always fit situations where resources are scarce:

A bit of frustration, to be honest, with WFOT [World Federation of Occupational Therapists], so I kind of got partly blacklisted by WFOT in the early days because they didn't agree with the fact that I was training [local] people in how to do basic physio and OT. Because they didn't have the right qualifications. And I said fine, if that's the way OT's done I don't want to be part of it, because I actually feel very passionately about when people need services, where we have needs on a population level in refugee camps or in war zones, or in disasters and so forth, you actually have to work with what you've got.

Similarly, Participant D added that regulations and control of practices might not be one-size-fits-all answer when working in extreme contexts:

A lot of what OT's actually do in practice or have done traditionally in practice - maybe that's going to change because, you know, the various ways in which we need to control the labels of the product [...] One size doesn't fit all. So there has to be some sort of fine tuning of all these things, particularly where resources are poor. The wise to read about OT's without borders, people can do all this amazing stuff. They aren't regulated up to the eyeballs [participant added later: or they can

negotiate improvisations and innovations, perhaps because they are dealing with fairly extreme contexts].

Some participants also described how this increasing demand for homogenization and standardization contradicts their need for adapting practices to social and structural changes. As one example, participant A attempted to resist this demand by teaching students about the changing nature of social transformative projects:

The work that you are trying to do and to teach the students in this project, it has a very flexible nature. You have to adapt to the settings or to the institution that you're working with. Maybe your objectives will change, maybe you have to renegotiate your position every year.

As another professional strategy, some participants described how a pressure for maintaining an expert role promotes a hierarchical therapist/people relationship which creates tensions with the social transformative ideals of collaboration and equality. For example, Participant C described the need for a 'mental head shift' to avoid keeping an expert role:

We need to be willing to kind of take off the white coat, and be part of a team, and we need to be willing to say, yes, we've got some expertise that we can bring in to share here, but we have to learn and listen from other people. And it does require a mental head shift because you're not the big expert, you're not the white coat with the expertise giving people – this is the recipe, you know?

Participant E added that maintenance of the role of the expert perpetuates the idea that 'the therapist knows best' and thereby can set goals on behalf of others:

So then, we made a project and goals that we made ourselves often. And that I should now not do, so the goals should be made also with the people involved. Still too much in expert role. And students will always like that.

Based on the participants' comments, maintaining an expert role risks positioning the therapist as superior, de-emphasizing the contribution of people's knowledge, and

imposing the therapist's goals onto others. Thus, power differentials are sustained, hindering occupational therapists from promoting people's agency and trusting their skills to organize social change. Participant B described the point when 'the experts' realized that they did not need to be responsible for all tasks in a project:

When there was a certain problem, we're looking for somebody who knows what to do here and there, or who can organize soil for free, that kind of thing. And that was something that surprised even the social workers, the one who works for that initiative, and the one who works for the city district, that so many people sort of just showed up, and said, I know how to do this, or I can help you with this and that. And I think that was really the point when it changed when the students realized, we are not responsible for everything to go right, because, as it turned out, we hadn't planned everything perfectly, because we are not woodworkers. And then, I think, that was also for the community to see, we can do this ourselves.

Similarly, the perpetuation of the role of the therapist as the expert can create an illusion of power and status that reinforces the need for maintaining the profession's established fields of practice. As exemplified by participant B who described how a potential loss of the profession's domain impeded the engagement of students in social transformative practices:

If due to, you know, all the agenda of occupational science, we stretch our expertise even further, sort of this irrational thinking: 'we will just get punished by having everything taken away from us, even the established traditional fields of OT'. So that was a very funny time in 2008/2009 where quite a large number of students said, 'Let's not do such a project because sort of we may get punished by ending up with no job'.

A focus on maintaining the profession's domain and status can also risk shifting the focus of practice away from the profession's social responsibility onto protecting its survival and self-interests. Participant E commented how protecting the profession's domain can result in promoting the profession instead of social transformative/justice goals:

I think also this professionalism and the associations. You see at a certain moment that they try to protect it as my territory, that makes that it happens like this. Then we want to promote the profession – I always think no, it's not promoting the profession, it is promoting occupational rights or making sure that everybody can do their occupations.

Participant D also described this pressure of sustaining the profession's domain in relation to status to power:

So some of the discussion seems to be about, you know, how the profession sustains itself, which is very Foucauldian issue, how a profession creates itself, how it maintains power, and how it maintains power in a hierarchy related to other elements of that market structure.

Further, participants described that the profession has aligned with standardized approaches and healthcare guidelines to preserve professional status and power. Participants shared stories that illustrate how approaches that focus on objective evidence and measurements often conflict with social transformative processes.

So when we look at these things in a scientific way with actually cutting off a lot of the factors that would queer the pitch for analyzing what really takes place, so we've limited all the things down to something which is measurable, but what we're dealing with in terms of human occupation is supposed to be holistic and fluffy and not very well defined. And so, we're losing all that (Participant D).

We have to have other type of frames. [...] I have a problem with evidence-based approach in the way that it's promoted in some ways as we have evidence, that it's very the evidence against what? It doesn't allow for difference, difference in context and difference in how we think function and occupation and lived experiences (Participant C).

Along these lines, although most participants highlighted the need for being accountable for their practices, they have resisted accountability mechanisms that focus on outcomes and assessments by negotiating the ways social change can be demonstrated. As

illustrated by participant C who works together with non-governmental organizations (NGOs) on how being accountable for their projects:

We need stronger tools and focus around how we value and account for this type of practice. We are working with processes that are not tangible, and cannot be measured. But the reality is that we as profession need to be accountable. So we try to put more emphasis working with local NGOs on how do you account for your efforts, not just the activities that you are doing but how does participation look like, resilience or capacity building look like? What does it mean in terms of indicators? Because you still have to demonstrate that change is happening.

Participant B added that her way to negotiate the pressure for accountability mechanisms, shaped by the systems in which she is employed, was to enact an occupation-based project related to urban gardening and community building:

Very often the contextual factors are just really difficult. For example, when you do a project like, a university project, most of the time, these days, it's very short-lived, and you need to present some sort of results very quickly. And when you work with community development and have that purpose of promoting long-term effects and sustainability, that just really doesn't go together very well [...] And what I like about urban gardening and all the literature that goes with it, is that they really have some philosophy that you can put into practice, and that goes very well sort of against neo-liberalist ideas of productivity, and efficacy results.

6.4 Discussion

In agreement with authors such as Malfitano and colleagues (2014), Guajardo and colleagues (2015), and Sakellariou and Pollard (2017), the intention behind this paper is to open up space for intercultural and critical dialogue among diverse knowledges and practices, what Santos (2014) calls ecology of knowledges. With this term, Santos (2014) invites us to move beyond abyssal thinking that consists of a system of visible and invisible distinctions that divide social reality into two realms, privileging one side while producing the other as not existent, at the margins or non-comprehensible (e.g.

formal/informal, rural/urban, scientific/experiential knowledges). The findings of this study contribute to making this division ‘visible’ by examining discourses and other contextual features that create tensions and set boundaries for social transformative practices, as well as point to ways that these may be negotiated in attempts to enact these practices.

As articulated by other authors (Guajardo et al., 2015; Sakellariou and Pollard, 2017), occupation-based practices are shaped by invisible lines that privilege a type of knowledge and practice within occupational therapy and science that constrain our possibilities to work along with people in critically-informed, egalitarian and transformative ways. Thus, although these types of practices are being shared within diverse regions, there continues to be a pressing need to discuss these efforts and their implications to develop appropriate ways to ‘do’ practice aligned with social transformative and justice goals.

Drawing on the analysis of this study, social transformative practices have emerged in diverse geographical locations that seem to share similar challenges with neoliberalism, capitalism, colonialism, and other socio-historical forces. In addition, this study illustrates the ways in which tensions experienced across social transformative practices are interwoven and deeply embedded in a complex landscape of discourses, contextual forces and broader ideologies (i.e. systems of social and/or professional ideas, expectations and norms). Thus, adopting a critical stance, I present a discussion of three ideological frameworks (Van Dijk, 2006) that influence practice and the larger social, cultural and political system in which social transformative practices are embedded: *neoliberalism*, *healthism* and *managerialism*.

As a broader framework, *neoliberalism* serves as an explanatory umbrella for how the phenomena of individualism and individual responsabilization for social issues have overtaken the fields of human occupation, health and human relationships. Although neoliberalism as a political economic theory emerged in the second half of the twentieth century, it has continued to spread and diversify through processes of globalization across the world (Gibson, 2016; Ilcan, 2009). In close alliance with capitalism, contemporary

neoliberalism promotes human well-being as attainable through free market economies that are allowed to grow with minimal government intervention (Ayo, 2012; Gibson, 2016). Using this political rationality, neoliberal policies have restructured public institutions and social life (Harvey, 2007) and more significantly attempted to shape how individuals perceive themselves, society, social relations, ways of life and thought, attachments to the land and their occupations (Rose, 1997). Thus, while economic and social disparities are increasing around the world, neoliberal political rationalities have re-shaped the social domain and linked a reduction in state services and security systems to the increasing call for ‘personal responsibility’ (Polzer & Power, 2016). In doing so, neoliberal rationalities and practices have promoted a form of active citizenship whereby individuals are expected to exercise responsibility for their actions and lifestyle choices, disregarding the structural causes of social issues. Within such activation, occupation has also become individualized in ways that obscure the socio-political production of inequities (Gerlach et al., 2017; Laliberte Rudman, 2013).

In this context, values such as self-interest, autonomy, productivity and self-sufficiency are promoted (Gibson, 2016). These values place emphasis on individuals ‘freedom’ to choose how to maximize their life as a kind of enterprise (Polzer & Power, 2016). However, this apparent freedom not only contributes to the responsabilization of the individual for her/his actions, but supports the construction of moral judgments that focus on individual behavior, that is, placing blame on individuals for ‘their choices’. Moreover, the problem with this framework is that it may stifle the transformative potential of occupation as it seductively infiltrates powerful individualizing tendencies within social practices and professional strategies. As such, addressing these challenges and tensions affecting social transformative practices is essential to promoting ways of doing practice that resist neoliberally-informed ways of thinking and acting. For example, the findings of this study highlight how participants negotiate and resist individualizing tendencies by taking up critical perspectives that move away from professional assumptions that view human beings as authors of their occupations to focus on how occupations are shaped through contextual forces and within power relations. In addition, participants’ experiences raise concerns about the ways social transformative practices could be enacted at group or population levels, yet co-opted by neoliberal tendencies that

keep a focus on changing people's behaviours. The findings also promote the inclusion of processes of critical awareness within social transformative practices to bring attention to the larger connections between people's situation and social structures, and thereby dismiss individual solutions that fail to consider the systemic roots of injustices.

Another ideological frame that challenges the ideals underlying social transformative practices is *healthism*. Healthism represents a particular way of viewing health problems, situating the problem of health and disease at the level of the individual (Crawford, 1980). As such, healthism is embraced in neoliberal societies and taken up within biomedical approaches that also prioritize health related to individuals' bodies and their exposure to harm/disease (Crawford, 2006; Gibson, 2016). This understanding of health involves practices of both responsabilization and marginalization. On the one hand, healthism shapes popular beliefs by producing discourses that create expectations in relation to the maintenance of one's own health as a citizen and moral duty. At the same time, neoliberal practices exacerbate social and economic inequities that create new lines of privilege and oppression related to opportunities for health and well-being (Polzer & Power, 2016). This implies that health, constructed as a super value (Crawford, 1980), a representation of all good actions and behaviors, is only attainable by those who can afford and choose to stay 'healthy' (Polzer & Power, 2016) which in turn produces moral judgements based on how others succeed or fail in adopting health practices based on character or personality (Crawford, 2006). In this study, participants raised concerns about practices that prioritize health as an ultimate outcome since they can increase the vulnerability of those who are unable to choose or that resist engaging in 'right' occupations that are framed as health-enhancing and promoting. This questioning of the notion of 'free' choice, aligns with emerging work within occupational science and therapy that challenges individualistic notions that portray humans as "able to seize opportunities, shape their own future, reach their own target, take charge of their own lives" (Kantartzis & Molineux, 2011, p.65). The findings also add to this increasing awareness by pointing to the socio-political production of occupation as healthy or unhealthy (Kiepek, Phelan & Magalhães, 2013), and the political and socio-economic factors that influence people's choices and access to participation in occupations (Galvaan, 2012).

Additionally, in societies characterized by healthism, health can serve as a justification for interventions and projects that allocate 'risky' behaviours or an inability to keep up with health-enhancing activities onto individuals (Crawford, 2006). This implies that social transformative practices, co-opted by governmental agencies and funding that follow neoliberal tendencies, risk focusing on 'strengthening' individuals' behaviours and choices as effective interventions for promoting health (Madsen, Kanstrup & Josephsson, 2016). In doing so, social transformative practices can promote individualizing solutions to social problems that have been framed as 'health issues' (e.g. alcoholism, homelessness, unemployment) (Holmqvist, 2009; Wasserman & Clair, 2011; Tournier, 1985). This can be seen as a key explanation to why participants in this study articulated the need to position their practices as outside the health realm and/or health system, since it allows them to resist engagement with the ways social problems are being individualized and framed as health issues. While positioning social transformative practices as outside the health system does not solve the problem of healthism, it has provided space for participants to explore social issues in ways that do not reduce them to health/illness. However, this positioning risks refraining from applying social transformative practices to issues that have been framed as related to 'health' from social/collective perspectives. In the same way, avoiding to engage with the ways social issues are being framed as health issues may risk ostracizing these practices from other social-related initiatives emerging within the realm of health.

Further, the positioning of social transformative practices outside the health system, as implied by the participants, enhances the risk of not receiving health-related funding, which in turn increases need for the participants to draw on their own personal time and resources to support their projects, making it difficult to engage in long-processes of collaboration and social change. Within this context, the findings reveal a collective desire for reconceptualizing health in relation to social and political issues while acknowledging the challenges of exploring health in relation to occupation within the current ways health is being framed.

Similarly, *managerialism* (i.e. New Public Management) has extended a neoliberal agenda to the social realm shaping the public-sector, social policies, programs and

projects. Professionals under this New Public Management (NPM) are expected to work in line with guidelines or protocols and criteria of evaluation that are not necessarily of their own choosing (Dent, 2006) or appropriate to their context or resources. Rather, the outcomes to work towards are aligned with neoliberal aims of activation and responsabilization. This has been facilitated by the external pressures for greater effectiveness, efficiency, and accountability demanded by the NPM (Newman, 2001) that promote strategies including simplification, categorization and reductionism to enhance process efficiency (Brodkin, 2011). These strategies have had the objective of bringing cost and quality of intervention more effectively under control (Dent, 2006), emphasising a focus on 'what to measure' or 'what counts' as if it were obvious and apolitical (Brodkin, 2011). With this increasing shift, professions such as occupational therapy have confronted tensions between the demands for effective interventions and accountability, and client's complex situations (Hammell, 2007). For example, reductionist strategies have pushed the profession to expedite processes requiring them to assess individual's needs and devise intervention plans to fit them, risking imposing homogenizing interventions on individuals rather than focusing on their contextual conditions (Hammell, 2013).

In this context, the findings show that although there is a place for outcome measurement within occupation-based practices, there is more to quality than what can be counted (McGuire, 2004), as in the case of social transformative practices where the richness of the processes does not easily translate into standardised measures, scales, or indices. Indeed, the findings point to the need of acknowledging that 'what to count' and 'what not to count' is a fundamentally political matter (Brodkin, 2011), particularly for social transformative practices that aim to examine the political dimensions of occupation in relation to the role of occupational therapy in society (Kronenberg & Pollard, 2006). In this sense, the findings support questioning the logic of NPM that focuses on professions' 'successful' interventions, challenging the idea that, as long as what is meant to count is measured, it is no longer necessary to consider 'how' social processes are enacted. However, questioning the logic of NPM can be a challenge for practitioners since they also need to resist the professional pressures that 'steer' their practices toward desired

objectives that seek to consolidate a professional identity and increased status (Hammell, 2013).

The rhetoric of NPM also takes up neoliberal values such as autonomy, choice and empowerment in the public sector (Dent, 2006). These values have been promoted to increase clients' role as autonomous, 'empowering' them to become self-governing and improve 'their situation' (Ayo, 2012). In relation to these values, the findings illustrate ways in which participants have worked with students, organizations, and other professionals to avoid following the imperatives set by NPM. As an example, participants have prevented individuals from taking on the responsibility for the outcomes of social programs/projects by avoiding promoting a discourse that responsabilizes individuals for their problems, and raising critical awareness of the contextual forces that shape their situation. Participants have also resisted NPM demands by not incorporating standardized measurements of success, but rather creating new measurements that instead captures processes of awareness and social change. Further, the findings highlight the need to challenge the professional calls for empowering people through promoting client autonomy and choice, maintaining the role of occupational therapists as authoritative and expert advisors. In this way, the findings illustrate how keeping an expert position risks enacting social practices aligned with NPM discourses that seek to empower individuals by focusing on their ability to become enterprising individuals. At the same time, the findings highlight the importance of addressing these tensions by promoting collective awareness and action to move away from frameworks that promote an expert role, risking to hold individuals accountable if they do not follow the experts' normative prescriptions/advise.

6.5 Limitations and future research

Prior to discussing the implications of this analysis, it is relevant to acknowledge its boundaries. Although at least three participants would not identify themselves as academics but as working at the margins of the profession and discipline, the participants taking part in this study have clear connections to academic institutions. Overall, participants' connections with the occupational therapy academic culture and access to publications suggests that their experiences may be more aligned with those working in

between the academic and practice circles. This aspect also implies that there is potential for future research with individuals engaged in social transformative practice outside the umbrella of academia to examine the specific tensions and challenges that an exclusive focus on practice may generate.

Additionally, it is worth observing that all dialogical interviews were conducted in English and that of the five participants, three are non-English speakers. This implies that some of the participants could have experienced language barriers resulting in difficulties articulating their experiences as they wanted/expected. While this issue was somehow addressed by inviting participants to review and edit their transcripts so that they could extend their ideas by writing insights or clarifications, this potential language barrier needs to be acknowledged. Further research might explore the implications of intercultural dialogue within research that attends to the geographical dispersion of social transformative occupation-based practices. This type of research could contribute to expanding the discussion regarding these practices by incorporating experiences from diverse locations that have been neglected or dismissed because of language barriers.

6.6 Final considerations

This analysis has deconstructed tensions emerging in social transformative practices, and explained them through the lenses of neoliberalism, healthism and managerialism. As such, this study brings attention to how these logics are deployed in ways that reflect and reinforce neoliberal assumptions within practice, and influence individuals and professionals' ways of thinking and acting. Further, this study seeks to open dialogue regarding the need for taking up processes of conscientization within social transformative practices as a way to avoid individualizing tendencies. In doing this, the findings raise concerns about how the concept of conscientization/awareness is being used within occupation-based practices, since it can be confused with individual/group processes of self-reflection that stop at the level of mere subjective perception of a situation (Freire, 1970). Thus, while such attempts represent a valuable effort toward enhancing people's awareness, the findings point to the need for a deeper engagement with critical theorists such as Freire (1970) who promotes conscientization as a means to express collective discontent that threatens the status quo and propels social action.

This study also invites reflection on the relationship between the evolving social transformative practices within occupational therapy and the concept of health. Having recognized that the concept of health in its current dominant framing creates tensions with social transformative goals, it seems relevant to examine the positioning of these practices outside the health realm and/or health system. Indeed, as a next step, there is a need for considering the ways being located outside the realm of health could provide creative spaces for reconceptualizing health in relation to social issues, but also for potential ostracization and continued marginalization of these efforts. Moreover, given that many health issues are socially located and shaped, positioning transformation practices outside the realm of health may lead to a failure to make real change or have any impact on the ways health is being framed by biomedicine and healthism. Consequently, addressing these issues through dialogue could promote ways in which social transformative practices can work toward expanding how health is being discursively framed and practiced in relation to the individual and social and structural issues.

Based on the insights of this study, it seems necessary that endeavours that explore the transformative potential of occupation avoid adopting current mechanisms of accountability promoted by the profession and larger discourses that focus on 'what it means to be effective' in parallel with broader neoliberal aims such as self-reliance, entrepreneurship and efficiency. Not only do these mechanisms risk shifting the focus of social transformative practices toward standardized objectives of successful interventions, but they also perpetuate occupation-based practices as apolitical and neutral. Thus, going beyond these boundaries can facilitate the co-creation of other ways of demonstrating 'how' social transformative processes are locally situated and unfolded alongside specific communities.

While the findings illustrate moments of resistance, they also show the power of professional values and frameworks that seem to dismiss, or at least devalue, social practices to justify the profession's status and power. Correspondingly, this analysis contributes to raising awareness of the exclusionary forces within the profession and the discipline that marginalize forms of practices that attempt to push the established

boundaries and ways of doing practice. To address these tensions, occupational therapists and scientists interested in embracing social transformative practices may benefit from continued engagement with critical theoretical perspectives to avoid maintaining the status quo. This engagement can facilitate examination of the ways in which the values and approaches proposed by the profession and discipline support or constrain social transformative efforts within specific contexts to avoid aligning with neoliberal agendas. In line with this, it is essential that such questioning considers the socio-economic and political conditions that have shaped occupational science and therapy within broader discourses and ideologies, and how they underpin knowledges and practices and their effects on society. Lastly, it is encouraged to continue sharing the ways in which individuals are engaging in egalitarian, social responsible and critically reflexive practices across the world to facilitate recognition and further development of diverse forms of occupation-based knowledge and action.

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Chapter 7

7 Discussion

In this section, I conclude with a summary of key findings and insights gained from undertaking this critical scholarship. I explore implications of this work for occupational therapists and scientists, other professionals, and critical qualitative researchers. I also consider the implications of this thesis for the further development of social transformative scholarship. Reflections on the research process, including methodological insights and reflections on my development as researcher, are also presented. Lastly, future directions and concluding remarks are proposed.

7.1 Key findings and insights

I completed my dissertation using an integrated manuscript style. Hence, the manuscripts all together aim to inform further development of occupation-based social transformative scholarship aligned with critical epistemology. Specifically, the objectives of this dissertation included:

- a) To examine how critical theoretical perspectives have facilitated the analysis of the discipline's foci and development, and epistemological and theoretical underpinnings.
- b) To deepen understandings of how critical reflexivity and critical epistemology can advance social transformative practices by avoiding the individualization of injustices.
- c) To enhance understandings of the potential of critical dialogue to elucidate and reflect on the complex challenges that emerge in professional practice.
- d) To raise awareness of how occupation-based social transformative practices are shaped by discourses that can constrain the possibilities for addressing social and health injustices.
- e) To co-construct knowledge regarding occupation-based social transformative practices with individuals that are attempting to enact them.

The first manuscript (chapter two: A critical interpretive synthesis of the uptake of critical perspectives in occupational science) emerged partly in response to calls within the occupational science literature for advancing “an emancipatory agenda in which we stress the power of occupation to address global population inequities” (Hocking & Whiteford, 2012, p. 3). This manuscript was also inspired by an evolving scholarly movement that seeks to move into more critical and reflexive directions through examination and re-thinking of the epistemological assumptions that frame occupation-based work (Angell, 2012; Laliberte Rudman 2014, 2015; Townsend, 2012; Whiteford & Hocking, 2012). This led to a critical examination of how critical theoretical perspectives have been taken up in the occupational science literature and how the calls for a socially responsive discipline have evolved, providing new insights regarding this international scholarly movement.

As a main contribution, the first manuscript demonstrates that critical perspectives have been employed for diverse purposes, such as; identifying key epistemological boundaries within which the discipline has operated, attempting to move the occupational agenda into socio-political realms, and taking up early calls to attend to the transformative potential of occupation to promote justice. Further, it raises awareness of the potential of occupation as a means to enact social transformation, inviting further dialogue about the types of values that the discipline needs to embrace, or is willing to create space for, in order to mobilize this transformative intent. In addition, this manuscript demonstrates that the use of critical perspectives within occupational science is more than a proposal, but a growing scholarly moment that seeks to push beyond the limits of what the role of occupational science in society has been considered to be. Lastly, the findings of this manuscript align with those calling for taking up the social responsibility of the discipline (Frank, 2012; Hocking, 2012; Magalhães, 2012), pointing to the need for clarification of what is meant by transformative scholarship, as well as an articulation of the values and assumptions that can guide this work.

The second manuscript (chapter three: Illustrating the importance of critical epistemology to realize the promise of occupational justice) arose from reflexive conversations with my supervisor regarding the need for examining the efforts that have emerged in response to

the calls for moving into critical and social directions, and from insights that surfaced in the previous manuscript. As a main insight, this manuscript takes up the intent forwarded in the first manuscript; to attend to the transformative potential of occupation to promote occupational justice. In doing so, it argues for embracing critical epistemology to question the power relations and conditions that (re)produce injustices.

Further, this second manuscript expands on the findings from the first manuscript that point out how critical perspectives have been used to deconstruct the epistemological foundations that have bounded the practice and study of occupation within individual-focused approaches and positivist/postpositivist assumptions (Galheigo, 2011; Hocking, 2012; Kantartzis & Molineux, 2011; Magalhães, 2012). As such, this manuscript proposes the existence of an epistemological tension between the stated intentions to address occupational injustice and the epistemological assumptions that shape efforts that aim to create a more just society. Based on this tension, this manuscript illustrates how positivist/postpositivist assumptions can shape understandings of occupational justice in ways that perpetuate individualistic approaches. Further, this manuscript responds to the concerns forwarded in the first manuscript that stress the need for immediate dialogue to ensure that in moving toward social and politically engaged directions, we do so in ways that are congruent with the values underlying these intentions. Lastly, it raises concerns regarding an apparent ‘stuckness’ in moving beyond articulating a commitment to enacting social transformation and justice, inspiring the studies described in the fourth and fifth manuscripts (chapters five and six).

After conducting the critical interpretive synthesis described in the first manuscript, I realized that there was a gap in knowledge in occupational science and therapy regarding what a critical stance means when applied to research and practice, and how critical epistemological assumptions can support transformative scholarship. I also found that transformative scholarship has not been articulated in detail in the occupation-based literature and that a further exploration of this scholarship would contribute to the broader aim of my work. Consequently, the second and third manuscripts respond to the need for clarification of the values and assumptions that guide transformative scholarship aligned with social and occupational justice goals.

The third manuscript (chapter four: Reclaiming the potential of Transformative scholarship to enable social justice) emerged from the need forwarded in the first and second manuscripts; to articulate how transformative scholarship aligns with the critical paradigm. For this purpose, this manuscript introduces transformative scholarship and deconstructs two contemporary examples that self-identify as transformative to illustrate the importance of critical epistemological assumptions to the intents and enactment of transformative scholarship. Further, this manuscript demonstrates that the tension experienced within occupational science, arising from being historically bounded to positivist/postpositivist notions and individualistic approaches, is shared by other fields. Lastly, this manuscript adds to the previous manuscript by proposing to reframe transformative scholarship as a space for combining critical and participatory processes in which people can reflect on their diverse experiences, and examine the broader forces that shape their realities. This proposal of transformative scholarship is later taken up in the fourth and fifth manuscripts (chapters five and six).

Both manuscripts (second and third) speak to how epistemological assumptions shape what kinds of knowledge, concepts, and issues are legitimate, thereby shaping inquiry and practice. The manuscripts illustrate how epistemological assumptions interact with and bound our understandings of injustices in ways that can illuminate or obscure the power relations, conditions and processes by which particular groups are marginalized and excluded. This understanding of the continuous transposition of epistemology and practice is central to my thesis since it provides theoretical arguments for promoting the integration of critical perspectives to question the epistemological assumptions that underlie the practice and study of occupation. Further, this insight is also essential when arguing for the need to embrace critical perspectives to promote more complex understandings of occupation in relation to people who experience varying forms of marginalization, and for exploring methodological approaches to knowledge construction that align with social transformative directions.

Reflecting on this critical scholarship, the first three manuscripts played a significant role in providing space for exploration of epistemological assumptions that would support the discipline and profession toward critically-informed and transformative directions. They

also suggested key theoretical foundations and considerations for the methodological approach forwarded in the fourth and fifth manuscripts (chapters five and six).

The fourth manuscript (chapter five: Critical dialogical approach: a methodological direction for occupation-based social transformative work) takes up the call forwarded in the third manuscript for embracing methodologies that promote complex understandings of occupation and the conditions that (re)produce injustices by proposing a critical dialogical approach. This manuscript introduces this approach as a research tool that can offer a different perspective on knowledge construction in relation to mainstream research approaches. As such, it contributes to extending the frameworks of research used in occupational therapy and science, enacting critical reflection and examination as possible ways of knowing and learning together with the people with whom we engage.

Further, this manuscript presents insights on the procedures and partnerships developed in the study described in the following chapter (chapter six). Expanding on these insights, it can be said that they provide an opportunity for examining the ways in which research on occupation often is conducted and the limits that positivist/postpositivist notions of science can impose on collaborative and transformative endeavors. These insights touch on the issue of relationships between researchers and participants which can vary from high levels of partnership to being highly differentiated and asymmetric, depending on existing power relations and the degree of acknowledgement of their effects on people's relationships. While this manuscript focuses on the collaborative processes conducted in a study, its considerations for involving participants in the co-construction of knowledge can be extrapolated to transformative processes in which a less hierarchical, inclusive and more reciprocal agenda is promoted.

The fifth and final manuscript (chapter six: Examining occupation-based social transformative work using a critical dialogical approach) builds on the calls forwarded in previous manuscripts for examination of the epistemological assumptions that shape the efforts that have emerged within occupational science and therapy as a response to global inequities. This manuscript expands these calls for examining the assumptions underlying practice, looking at the broader discourses and contextual factors that interact with and

shape these efforts. As such, this manuscript explores discourses and other factors that set boundaries on social transformative practices, which in turn suggests that the apparent ‘stuckness’ in mobilizing social transformative efforts described in the first and second manuscripts may also be a result of the tensions created by these discourses and the ideals underlying social transformation.

Overall, the fifth manuscript returns to arguments forwarded in previous manuscripts regarding the importance of critical epistemology to enact social transformative efforts. It also reiterates the need for creating spaces for breaking out of the boundaries that promote neutrality and a particular mode of practice, specifically advocating for creative ways of bringing together people’s experiences, knowledges, and possibilities for transformation. Additionally, this manuscript seeks to open dialogue regarding the need for taking up processes of critical reflection within social transformative practices as a way to avoid aligning with neoliberal agendas. Lastly, it raises awareness of the implications of discourses, particularly individualism, healthism and managerialism, in the shaping of occupation-based knowledges and practices.

7.2 Implications of this critical scholarship

The purposes underlying critical scholarship are to question and examine the epistemological assumptions and values that underpin existing theories and forms of practice, and foster new viewpoints by re-thinking what may be taken-for-granted (Jørgensen & Phillips, 2002; Kincheloe & McLaren, 2003). In addition, critical scholarship focuses on raising awareness of the effects that these underlying assumptions and values have on research, practice, and people’s lives (Alvesson & Sandberg, 2011, 2013).

From this standpoint, I seek to question the epistemological assumptions underlying occupation-based work, challenge the status quo of occupational science and therapy, and raise awareness of the type of occupation-based knowledge and practice that is being forwarded to promote social transformation. In doing so, I believe that this critical scholarship presents several implications for occupational science and therapy, as well as for other professions and critical qualitative inquiry. It is worth observing that the term

scholarship in this dissertation is used in a broader sense, not only referring to engaging in inquiry (Boyer, 1990) as understood from a positivist/postpositivist perspective. This means that when referring to this dissertation as ‘critical scholarship’, I recognize all five manuscripts comprised in this dissertation as knowledge acquired through significant engagement with theory, inquiry and practice. The implications are organized below in relation to key issues that surfaced in this dissertation.

7.2.1 Implications for occupational science

This critical scholarship contributes to the scholarly debates concerning the role of occupational science in society, particularly by advancing knowledge regarding the epistemological assumptions that have shaped the discipline and limited its contributions to social change. In the first manuscript (chapter two), I discuss three critical turns arising from this analysis that contribute to enhanced understandings of how critical perspectives have allowed scholars to push the discipline’s boundaries by challenging the notion of occupation aligned with individualistic approaches. In addition, I describe in this manuscript how scholars have expanded the conceptualization of occupation as situated in relation to power relations to forefront issues of injustices, raising questions regarding the types of changes that the discipline needs to embrace when moving in transformative directions.

By revealing the limits of an individualistic approach for understanding issues of injustice, this work contributes to the further development of the construct of occupational justice aligned with critical epistemology. In the second manuscript (chapter three), I illustrate the limitations of bringing together positivism/postpositivism and the goals of occupational justice within a transformative perspective. While examining the epistemological assumptions underlying occupational justice and the ways this concept has been taken up, I question if a tendency to individualize injustices is related to an apparent ‘stuckness’ in moving beyond stated intentions to address occupational injustice. Based on this questioning, in the fifth manuscript (chapter six), I explore how broader discourses and contextual factors shape the emergence and development of social transformative endeavors. By conducting this study, I realize that the ‘stuckness’ described in the first manuscript is not only related to the dominance of individualistic

and positivist/postpositivist approaches within the discipline, but also to the larger discourses that perpetuate these assumptions.

Yet, in the fifth manuscript (chapter six), I describe how this ‘stuckness’ is negotiated in various ways by individuals attempting to enact social transformative practices. In line with this apparent stuckness, the fifth manuscript illustrates that while occupation-based transformative practices are increasingly being shared and discussed, they are often not valued and understood. Addressing this issue, this manuscript reveals the power of professional notions and discourses that seem to dismiss, or at least devalue practical knowledge to justify the profession’s status and power (Hammell, 2013; Guajardo, Kronenberg, & Ramugondo, 2015; Sakellariou & Pollard, 2017). As such, this analysis adds to the recent calls for disrupting the epistemological assumptions that privilege a type of knowledge while constraining our possibilities to work along with people in critically-informed and transformative ways. Lastly, this manuscript links these calls for disrupting the type of knowledge that is privileged within occupational science to the arguments forwarded in the first manuscript (chapter two) that seek to open up space for notions of science that support engagement in knowledge generation and action with and for people in conditions of oppression and/or marginalization

7.2.2 Implications for occupational therapy and other professions

Drawing on my background as an occupational therapist and on the experience of conducting this dissertation I have realized the importance of challenging the status quo of occupational therapy by raising awareness of the ways of thinking and acting that have been perpetuated within the profession. Based on the findings of the first manuscript (chapter two), the integration of critical perspectives in occupation-based literature have demonstrated how normative ideals guiding the profession since its foundation have led to an objectification of occupation in dichotomies such as good/bad, normal/abnormal and healthy/unhealthy. Such simplified division of occupation in static categories has also conferred value and power to some occupations but not others, in turn perpetuating ideal ways of living that have marginalized those who resist or cannot access the ‘right’ occupations (Kantartzis & Molineux, 2011; Kiepek et al., 2013; Molke, 2009). In particular, this criticism (see more details in chapter two) regarding the ways these

assumptions have been uncritically inherited by occupational therapy, has been essential to raising awareness of the limits of an individualistic and narrow focus of occupation when trying to understand the diversity of ways occupation can be understood and enacted (Hocking, 2012; Kantartzis & Molineux, 2011; Magalhães, 2012).

Similarly, in the second manuscript (chapter three), it is demonstrated that although there has been an important critique regarding the risk of maintaining a Western positive focus on the individual in occupational therapy, there is still a tendency to rely on familiar positivist/postpositivist stances that can result in situations where adaptation to current unjust social structures is unconsciously facilitated. Building on this recognition, the final manuscript (chapter 6) illustrates the role of discourses and contextual forces in shaping practice. Awareness of these external forces has the potential to sensitize professionals regarding the complex situatedness of their practices and in turn may provide opportunities for implementing tools for fostering recognition of factors beyond the individuals' control that restrict occupation.

Further, based on my experience completing this dissertation and as an occupational therapist, I propose that critical perspectives can inform not only the notion of occupation, but also the notions of participation, disability, normality, independence, and capability, among others, that constantly (re)produce the discourses that construct people's realities (see more in chapter 5). Critical examination of notions used in practice and their impact on people's possibilities is central to re-thinking these notions, and reconfiguring their meanings and implications (Hammell, 2009; Kirby, 2015; Morris, 2004). Used in this way, critical examination may assist individuals as well as professional bodies in recognizing broader discourses and professional notions that shape practice, revealing the implications for ways of doing and being promoted through their work. Such relationships between discourses, assumptions and practice may be overlooked with demands from institutional structures and professional forces. Therefore, critically reflecting on why things are done (e.g. what conditions, practices and discourses marginalizes certain ways of doing) rather than only learning how to 'do' practice, is essential.

7.2.3 Implications for critical qualitative inquiry

As pointed out in this dissertation, critical qualitative researchers are attempting to reorient inquiry to focus on addressing social inequities (Cannella, Pérez, & Pasque, 2015; Denzin & Giardina, 2009; Hsiung, 2016; Meyer & Paraíso, 2012) (see more chapter four). In doing so, many scholars are taking up transformative scholarship to highlight the socio-political conditions that shape people's possibilities for changing oppressive structures. Yet, based on the analysis conducted in the third manuscript (chapter four), it appears that transformative scholarship has been taken up within two well-known contemporary frameworks that seem to fail to develop contextually situated understandings of injustices. Thus, by deconstructing these frameworks as examples of transformative scholarship, the third manuscript contributes to raising awareness of the potential dangers associated with an often unconscious reliance on positivist/postpositivist assumptions, especially when aiming to promote social transformation toward justice.

This analysis has implications for critical qualitative inquiry by demonstrating the need for situating transformative scholarship within the critical paradigm. To illustrate this point, the findings discuss how privileging positivist/postpositivist assumptions of science and neoliberal pressures for 'solving' ongoing global inequities may risk causing injustice in one area when trying to promote justice in another. Further, the analysis raises concerns regarding how complex it is to enact transformative scholarship in contemporary contexts that often emphasize methodological prescription (Chamberlain, 2000) or the provision of strategies or list of steps to 'solve' injustices that risk disconnecting their causes from social processes and power relations.

In addition, this dissertation demonstrates that transformative scholarship not only requires being situated within the critical paradigm, but also being enacted through creative combinations of critical qualitative inquiry (chapter four). This knowledge contributes to a broader conceptualization of transformative scholarship aligned with the critical paradigm that may be essential for breaking out of the boundaries of positivism/postpositivism. In addition, this reconfiguration of transformative scholarship as a creative space for diverse forms of inquiry aligned with the critical paradigm may

create opportunities to not only consider the structural dimensions of injustices, but also more complex understandings of people's experiences of marginalization and/or oppression (more discussion in chapter four).

7.3 Reflections on the process

Critical work recognizes the influence of researchers' values and political stance on the processes of research (Cannella & Lincoln, 2011; Sayer, 2009). From this perspective, researchers' values and assumptions should become explicit in order to facilitate an interrogation of their positionality in relation to the phenomenon under study (Fine, Weis, Wesson & Wong, 2003; Lather, 2004). Accordingly, in this section, I reflect on the ways in which conducting this critical scholarship exposed and challenged my assumptions about practice and research, as well as my positionalities as occupational therapist and scientist.

Although I should have expected that my assumptions would be challenged throughout these four years, I could not help but assume that my initial assumptions were in line with critical goals directed toward challenging and disturbing 'the way things are'. I initially expected that my South American background would provide me with a deeper understanding of how social justice and occupational justice could be mobilized into research and practice. However, as I began exploring the literature, I realized that the concepts of social and occupational justice constitute a complex terrain that demands more than an explicit commitment to those experiencing oppression or marginalization. This process allowed me to understand justice as a moral compass that is not detached from the observer's values, experiences, and own standpoint which, in turn, can be influenced by dominant discourses (Sayer, 2009). Further, these insights helped me to conceive social and occupational justice as more than abstract terms but as constructs that interact with and are shaped by individual, social and contextual forces. Consequently, I can no longer visualize work related to social or occupational justice as separated from processes of critical examination of the diverse personal and social dimensions that shape our understandings of justice.

As another insight, I began my dissertation quite confident that my research stance and work was well situated within the critical paradigm. Surprisingly, I found myself struggling between two modes of thinking. On the one hand resisting the idea that there is only one legitimate way of thinking about practice and research, and on the other trying to come up with ways of moving forward in more socially responsive directions that would make sense to practitioners and scholars accustomed to (as myself) prescribed and standardized ways of doing. As I became more aware of these conflicting ways of thinking, I was not sure how to proceed on my own; whether to give in to the pressures that promote assumptions of objective science and prescription models, or push for the need for continuous examination of the ways in which emancipatory efforts are being enacted. Although it may seem an easy choice, the constant pressures at conferences and scholarly meetings where critical work was criticized for ‘questioning our practice for its own sake’ or for being ‘an intellectual or elitist exercise with no influence on practice’, made me aware of that I was not sure how comfortable I was in my own skin. Nevertheless, working through this dissertation, I began to reconcile some of my fears (e.g. being pushed at the margins of my profession/discipline, not being able to publish or find a job in my field), giving myself permission to take this opportunity as a time for exploring diverse ways of thinking and develop my own standpoint. Taking up this stance, I have attempted to expose my own conflicts with the profession and discipline, focusing on illustrating how our demands for neutral and objective knowledge create tensions with our intentions to work toward social transformation and the enactment of these intentions in practice.

In crafting my standpoint, I also realize that having a critical standpoint is not only difficult to communicate but also to define. Critical theories are always changing and evolving (Kincheloe & McLaren, 2005) making it impossible to denote them as a single overarching approach. In fact, I remember telling myself at times ‘why did I decide to take a critical stance? I have to explain every single idea in the most minute detail so that my critical theoretical influences are clear!’. Attempting to communicate my ideas interwoven with critical theories was frustrating and confusing at times, but now looking back I could not have done it differently; there is no coming back after getting involved

with critical theories, it is no longer possible to avoid examining everything that is done or claimed about issues related to social justice.

For the past four years, I have learned about critical scholarship but also about myself as a scholar that still struggles with taking up some of the steps for embracing a critical turn toward transformative approaches that I propose in the first manuscript (chapter two).

These steps involve taking an activist standpoint, enacting a type of science that engages in knowledge generation and action, and negotiating the institutional and political demands in which we are immersed. Finally, I believe that these steps might not be easy to take, but I hope to continue contributing to the further shaping of the profession and discipline by questioning the social and institutional systems in which we operate.

7.4 Methodological insights

In the first three manuscripts, I primarily engage with critical theoretical perspectives to question how knowledge is produced and the directions taken in the field. This engagement with theory is an important part of critical scholarship since it enables scholars to create spaces for internal examination, which in turn can offer necessary insights for the thoughtful advancement of the knowledge base of the profession and discipline.

I believe that my personal and professional background helped me to challenge dominant Western values and individualistic assumptions embraced by the profession and discipline. As such, bringing my own experiences, culture, and beliefs into critical examination facilitated the process of questioning taken-for-granted assumptions promoted in Western contexts, such as Canada. In this light, living and studying in Canada for the past four years have provided me with an opportunity to immerse myself in a different cultural and socio-political context, helping me to reflect on the similarities and differences between perspectives and assumptions. Certainly, these insights have influenced my research interests and the standpoint that I have taken throughout my dissertation.

In the fourth and fifth manuscripts, I discuss some key considerations regarding the procedures and partnerships developed when employing a critical dialogical approach. However, reflecting on the process of conducting this critical dialogical study, I believe that the individuals that took part in the study shaped the research process in different ways. For instance, the participants did not report any difficulties structuring their time to commit to the process of dialogical interviews and critical reflexivity (i.e. answering to transcripts and researcher's critical reflection documents). They also did not report having difficulties reaching out to me via email with questions or comments, or managing the Skype software program for participating in the interviews. In addition, they all had clear connections to academic institutions and access to publications at the moment of conducting the interviews. Thus, these participants could be considered as individuals in positions of power with high levels of technological literacy (Keengwe & Onchwari, 2016) that allow them to work independently and with others to access, manage, integrate, evaluate, create and communicate information.

Although conducting research with individuals in positions of power from an ethics perspective can be seen as an advantage (e.g. minimal risk of emotional distress), in this study, participants' connections to academic institutions and being widely recognized in the fields of occupational therapy and science were factors that could have played as a disadvantage when conducting the interviews. For instance, I initially expected that I would be able to compensate for this power differential by drawing on theoretical knowledge developed through my first manuscripts, and bringing in issues that came up in my doctoral work. Certainly, I assumed that my knowledge regarding social transformative practices would be put in doubt and that I therefore would need to demonstrate my understandings through the questions asked and critical reflections sent to the participants. Nevertheless, while the difference in knowledge and power could have been a barrier to achieving an in-depth dialogue, participants demonstrated a high level of commitment to the research process and willingness to share experiences and interact with the documents sent to them.

Yet, initial scepticism regarding the purpose of the research, data analysis and dissemination from some of the participants was a challenge that I did not expect. Before

starting the interviews, some of the participants asked me to have a conversation with them regarding the study. Initially I thought these conversations would allow me to establish a certain rapport with the participants previous to the data collection, but the more I explained the study to them, the more I felt that some participants did not trust or believe in my stated research intentions. They seemed unsure of how the data (i.e. their knowledge and experiences) was going to be interpreted and disseminated, and the fact that I was also unsure at the beginning of how I was going to analyze the different pieces of data collected was not helpful. Indeed, the emerging nature of the study seems to be a factor that somehow threatened the participants' sense of confidence in the process. At that moment, I felt that I did not know how to handle the situation and (re)gain the confidence of the participants. This was a turning point for me since based on my theoretical influences, it would not be possible to enact dialogue without establishing a relationship of trust with the participants.

To overcome this initial scepticism, I had several conversations with my supervisor who reassured me that my study design would allow participants to take control over their sharing and gain confidence in the process. We also had conversations regarding how I could demonstrate my understanding of participants' initial reactions, and how to articulate my intentions more clearly. After those discussions, I returned to the participants and had more conversations regarding the study process. I learned a lot from that experience and gained insights on how I would approach other situations in the future regarding potential discomfort or distrust in the research process. Further, I feel that these types of challenges where power dynamics, fear of losing control over the experiences that you have shared as participant, and confronting an 'unknown' research process need to be more articulated within research and it is my intention to develop a manuscript based on these issues in the future.

Lastly, I recognize that although the critical dialogical approach proposed in this dissertation was used with individuals in position of power, its theoretical foundations make it also suitable for working with individuals and groups in conditions of marginalization and exclusion. It could be argued that this methodological approach worked very well in terms of commitment to the research process because the

participants were highly educated and with access to technology and resources. However, literacy demands and access to technology could be reduced or eliminated if the study was conducted in the same location as participants reside. For instance, the dialogical interviews can be conducted face to face and the transcripts could be read to participants, generating a more organic discussion regarding what was said in the previous encounters and how they feel about their opinions. Another alternative would be to conduct the dialogical interviews as group discussions, and the process of critical reflexivity could be set up as a moment to deconstruct and re-think their experiences, considering the larger forces that might be shaping their situation.

Along these lines, I believe that a critical dialogical approach has the potential to work with people that are experiencing social, health, or other types of inequities. Although I cannot say for sure what challenges could emerge when attempting to enact this approach, I cannot help believe that its theoretical framework could support the emergence of partnerships and collaborations between diverse groups. Perhaps one of my biggest concerns when thinking of its potential use with people in conditions of disempowerment is the development of a safe space for sharing experiences. Another concern is regarding the process of building relationships of trust between the researchers/facilitators and the participants that would allow the participants to engage individually or as a group in processes of conscientization regarding their situation. Thus, although I cannot say for sure what these processes would look like exactly, these possibilities raise more questions and expectations for future research.

7.4.1 Quality criteria

To ensure rigor throughout this critical scholarship, I paid close attention to quality criteria, incorporating scholarly suggestions to enhance the quality of the processes developed in each of the studies described in this dissertation. In this section, I begin describing the general processes employed in the manuscripts (chapters two to six), to then focus more specifically on the quality criteria used in the critical dialogical study described in the last two manuscripts (chapters five and six).

In the first three manuscripts, I primarily employed critical reflexivity as a means to enhancing the quality of the inquiry processes. This process was enacted throughout my work in form of individual and peer-reflexivity (Engels-Schwarzpaul & Peters, 2013). As a second strategy, I focused on grounding this critical scholarship in a substantive theory base that helped me design the questions guiding inquiry (Morrow, 2005).

In the first manuscript specifically, I employ a critical interpretive synthesis (Dixon-Woods et al., 2006) to engage with the underlying assumptions that shape and inform occupational science construction of knowledge. To facilitate this engagement, I designed a set of questions based on my engagement with critical theoretical perspectives and understanding of critical work. This set of questions was helpful for compiling a summary of each article included in the synthesis in relation to its purpose, assumptions, theoretical influence, rationale for critical approach, and attention to internal, external, and/or broader considerations (see questions in chapter two). This process was complemented by a process of critical reflexivity that started before the literature search of the articles included in the synthesis. In this case, critical reflexivity involved a process of note-writing about my understandings of critical work (e.g. what I consider to be critical and what sorts of critical work I value), as well as peer-reflexivity with my supervisor through discussion of my assumptions and values.

In the second and third manuscripts, I employ critical reflexivity and engage with critical theoretical perspectives to examine the epistemological assumptions underlying two contemporary frameworks that may be used to promote occupational justice and/or social transformation. Since these manuscripts are based on my candidacy exam, I believe that this long period of interaction (i.e. five months) with theory facilitated the process of deconstruction of the intentions, assumptions and ways in which these frameworks present transformative scholarship. Consequently, I primarily used this time to focus on developing an understanding of transformative scholarship and the critical paradigm, and compare and critically appraise multiple sources. It is worth observing that the candidacy exam should be developed independently by students with limited contact with their supervisors. However, for the writing of these manuscripts, I had continuous discussions with my supervisor and advisory committee members as a form of peer-reflexivity. These

discussions allowed me to work through my understandings, challenge my presumptions (Thomas, 1993), and raise awareness of the perspectives that I was bringing to my work (Carspecken, 1996).

In the fourth and fifth manuscripts, I describe the process of developing and enacting a critical dialogical study where a critical discourse analysis was conducted (Ballinger & Cheek, 2006; Cheek, 2004; Laliberte Rudman, 2013). For this critical discourse analysis, I developed an analysis sheet to guide the analysis by pushing beyond the participants' experiences to bring attention to the social meanings, power relations and discourses that shape their practices (Philipps & Hardy, 2002; Wodak & Meyer, 2009). This analysis sheet consisted of a set of questions informed by critical theoretical perspectives, the research questions of the study, and methods for deconstruction and contextualization of the data (Jäger & Maier, 2009) (see analysis sheet in appendix M).

Although the analysis sheet facilitated theory-informed analysis and ensured transparency of the analytical process (Laliberte Rudman & Dennhardt, 2015), it was very difficult at the beginning to distance the analysis from the participants' individual experiences and focus on the 'bigger' picture across them (i.e. discourses, contextual factors). For this reason, I read each participant's set of data several times and tried to attend to all possibilities that could be related to the analysis sheet questions. At the beginning, this process was frustrating since I was not sure how to answer the questions based on the participants' data set, and I found myself wanting to find direct information to answer the questions. In fact, it took me a while to realize that the analysis sheet questions were more helpful as a guide for my reading than a 'strict' one direction question-answer method. Thus, after I allowed myself more flexibility, I was able to regain focus on the analysis, and rather than trying to find answers, I could pay attention to the discourses and assumptions underlying each participant's data set.

Next, I attempted to conduct a cross-text analysis to compare the broader threads emerging across the 'answers' collected through the analysis sheet. Yet, I found myself again having problems trying to distance the data from participants' individual experiences. At this moment, I realized that I needed to go back to the transcripts and the

analysis sheet to get more ‘context’. This need for a more recursive and non-linear process is congruent with critical discourse analysis which allows for flexibility and development of cycles of analysis where data sources can be contrasted several times to reconsider their links and confirm their relevance to the foci of the study (Ballinger & Cheek, 2006; Cheek, 2004; Laliberte Rudman, 2013). At this point, I also needed to return to theory to keep my analysis grounded in Santos (2014) and Freire’s (1970) approaches. This re-immersion with theory helped me make sense of the data and deepened my understandings.

Further, to evaluate the overall quality of the critical dialogical study, I chose to use Pozzebon and colleagues’ dialogical principles (2014) because: a) they are consistent with critical and dialogical research, and b) they represent a compromise between formulations that are too universal and too particular by respecting a vision of validity where knowledge is a context-situated construction. According to Pozzebon and colleagues, these principles should be seen as recommendations rather than as a set of fixed standards, highlighting the importance of understanding how each study is embedded within particular contextual conditions. In this way, I employed these principles not to justify the research process but as a guide to enhancing understandings of how research processes are negotiated, moving away from static notions of neutrality and objectivity. In the following section, I discuss the principles that I used (i.e. authenticity, criticality and reflexivity) within the context of this particular study.

7.4.1.1 Authenticity

Pozzebon and colleagues (2014) suggest that authenticity refers to researchers’ ability to provide sufficient data of their field experience based on their immersion in the field or their interaction with actors deeply immersed in the field. In the critical dialogical study, I purposely included individuals widely recognized for their engagement in social transformative practices. Based on this criterion, it was expected that participants’ long-term involvement in occupation-based social transformative practices (e.g. between 10 and 30 years) would facilitate the achievement of in-depth data.

A sufficient amount of collected data is also recommended to provide evidence of the researcher's involvement in the field or with actors immersed in the field (Pozzebon et al., 2014). To generate an adequate amount data, I was able to successfully promote a long interaction period with the participants through dialogical sessions and critical reflexive cycles. Polkinghorne (2005) recommends multiple interviews with the same participant to ensure data depth and richness. In the study, each participant was involved in three dialogical sessions over the course of approximately six to eight months. This period also involved sharing of transcripts and critical reflexive documents which participants received two to four weeks apart, allowing me time to write the documents and review the data collected after each session. By interviewing the same participant at three separate points in time and sharing the documents in between the dialogical sessions, participants became more likely to add richer and more thoughtful and insights (Carspecken, 1996) to the following sessions. The process of sharing the documents also provided me with feedback from the participants regarding my analytical process, reinsuring that my emerging interpretations were authentic to their experiences.

Additionally, the participants were involved in the process of co-writing a manuscript (chapter five) which extended our interactions by two to three months. Overall, I believe that the amount of time spent collecting data was sufficient for getting to know the participants, establish relationships of collaboration and co-produce in-depth data. In fact, since the dialogical sessions facilitated participants' own critical reflexive processes which was helpful for them in different ways (see more details in chapter five), some participants explicitly verbalized their motivation for continued engagement in dialogical sessions.

7.4.1.2 Criticality

Pozzebon and colleagues (2014) suggest that criticality might be achieved by challenging conventional thought and reconsidering taken-for-granted ideas and beliefs. This dimension does not necessarily mean that the study must rely on critical theory, but it advocates for articulating the theoretical framework that is chosen and its relation to criticality (Pozzebon et al., 2014). Accordingly, depending on the source of influence, the criticality criteria could express the attachment of the researcher to different values: (a)

open participation (e.g., Bourdieu); (b) emancipation (e.g., Foucault); (c) re-structuring (e.g., Giddens); (d) coalition, and negotiation, and translation (e.g., Latour) (Pozzebon et al., 2014).

In attempting to enhance criticality within the critical dialogical study, I developed an analytical framework based on Santos's Epistemologies of the South approach (2014) and Freire's work (1970), both aligned with social emancipatory and decolonizing intentions. By employing this framework, the study examined how discourses and other contextual forces shape the ways that social transformation practices are constructed and negotiated. It also challenged taken-for-granted ways of thinking and discourses that influence occupation-based practices. Thus, the study does not merely describe social transformative practices but instead includes possibilities of criticizing the complex conditions that frame practice, and offers new insights in relation to the broader discourses that shape ways of thinking and doing practice.

7.4.1.3 Reflexivity

Reflexivity involves reflecting on the way research is carried out, bringing attention to the responsibility of the researchers to declare their assumptions and analytical process (Pozzebon et al., 2014). In other words, reflexivity can be linked to the process of critical reflexivity in which researchers scrutinize their positionality in relation to the interpretations produced in the study. Chapter five provides an in-depth discussion of how the process of critical reflexivity was enacted in the critical dialogical study. Nevertheless, adopting critical reflexivity in the study was not an easy task since it required a commitment from the participants to engage with the material sent to them, a commitment that could have been negatively impacted by the time and effort required.

Although I did not receive any comments from part of the participants regarding their extra time spent in this process, I was aware of being flexible at all times, providing extra time to the participants to return their comments and schedule next sessions. Even when they needed to suddenly change the time of our meeting, I was cognizant of being flexible and offer diverse alternatives. By adopting this flexible position and being receptive to participants' needs, I believe that they became more likely to engage with the

documents sent to them. Another interpretation is that participants' engagement with the material was a sort of means for 'regaining' control of their experiences shared in the dialogical sessions. In this way, by reading my critical reflections, they could visualize how the analytical process was unfolding and make some clarifications or add other information that could help shape that process. Further, having access to the documents and being able to edit their comments could have helped participants reclaim their experiences by challenging my assumptions and making sure that their experiences were being portrayed in line with their experiences.

7.5 Future directions

As a whole, the five manuscripts constituting this critical scholarship point to a number of possible future directions. The following directions focus mainly on occupational therapy and science research, practice, and education. It is worth noting that these recommendations are certainly not exhaustive of all potential future directions that could be taken based on this work. Likewise, these recommendations are not presented as prescriptive but as a starting point for discussing and envisioning different possibilities.

7.5.1 Recommendations for further research

The first three manuscripts of this thesis, through the types of critical examinations provided, bring to the fore examples of the importance of articulating the researchers' epistemological stance, theoretical framework, and values brought into the research. Most importantly, these manuscripts illustrate how researchers consciously or unconsciously bring assumptions and perspectives to their research that shape their understandings of occupation and justice. For example, researchers' belief systems regarding what is right/healthy/good/just can be different from those of the participants or their context, which can result in researchers imposing their views onto participants and/or determining what is desirable/good for them. Thus, future research would benefit from expanding current examinations, including other examples related to practice in different settings and with diverse groups. Especially beneficial would be research illustrating the implications of importing values and assumptions to places where these conflict with those embraced by the community/culture.

Further, this thesis introduces transformative scholarship as one epistemological space to move forward into critical and social responsive directions, building on the questions forwarded in occupation-based literature regarding the type of science that occupational science is or should be (e.g. Frank, 2012; Laliberte Rudman et al., 2008). Furthering this work, research would benefit from including creative combinations and/or examinations of other paradigmatic and epistemological spaces, such as postcolonial indigenous paradigms and relational epistemology (Chilisa, 2012), that could support the profession and discipline's social transformative goals.

At present, much of research in occupational science and therapy has adopted one-type of methodology (e.g. narrative, phenomenology, etc.), which has been helpful in deepening our understandings of these approaches to research. However, I find that a combination of approaches (e.g. critical and dialogical approaches, critical and participatory action approaches) could be particularly useful to enact research that is responsive to different contexts and social needs. I also suggest bringing in theoretical influences from the context in which the research is being conducted or from the researchers' background. I found that bringing a South American scholar such as Freire into my research allowed me to articulate my ideas and how I think about research in ways that better align with my personal values.

Future research may also benefit from the adoption of non-traditional methods of data collection. For example, in the critical dialogical study, I shared the transcripts with the participants, something that could be considered 'risky' from a traditional view of research (see discussion section in chapter five). Yet this method was particularly useful, and future research may benefit from attempting other ways of enacting collaborative processes.

7.5.2 Recommendations for occupation-based social transformative practices

The last manuscript mainly focuses on the relationships between broader social discourses and occupation-based social transformative practices. In relation to future directions for practices, this study illustrates how external forces shape and sometimes

bound practices, and how occupational therapists and scientists can become accomplices in processes of exclusion, perpetuating ahistorical and individualistic views of occupation. Based on this work, it is apparent that further examinations are required to elucidate the complex ways in which discourses and other factors can support or hinder the development of these practices. Further dialogue regarding the ways scholars experience and negotiate these forces would also benefit the expansion of social transformative practices.

Given that practice is always embedded within particular contexts, the possibilities for including critical reflexivity and dialogue within practices to avoid perpetuating discourses that responsibilize individuals for their problems are nearly endless. Specifically, I suggest that occupation-based social transformative practices would benefit from adopting a critical stance that promotes the development of practices that respond to the particular characteristics of the contexts where these are enacted. I also suggest that discussions regarding how certain practices are privileged over others should consider the ways in which broader discourses underpin these preferences. Recognizing how these discourses play a role in shaping dominant ways of thinking could benefit occupation-based social transformative practices by challenging the established boundaries and ways of doing practice. That being said, further development of social transformative practices would benefit from continued sharing of examples of how these practices are enacted within or outside these boundaries.

Raising awareness of how certain ways of thinking and doing are being privileged within specific contexts may constitute the first step toward opening up space for other types of practices. As such, the further expansion of occupation-based social transformative practices may also benefit from bringing attention to the practices being developed outside Western societies. This could bring new perspectives and knowledges that although they cannot be generalized, could provide possibilities for reimagining different ways of doing practice.

7.5.3 Recommendations for occupational therapy education

Although this thesis did not specifically analyze occupational therapy education, its findings can extend beyond research and practice to bring awareness to the ways in which uncritical and ahistorical perspectives may be perpetuated through education. In the last manuscript, participants articulate the need for integrating critical perspectives in education to increase students' awareness of the interactions between macro-structures and people's occupational possibilities. They also propose that students need to learn how to think within a continuum from individual to social/collective levels of action in order to adapt to the different needs and lived experiences of their clients. Based on these findings and in line with recent educational standards promoted by the WFOT (2016), I suggest that students would benefit from a broader curriculum that promotes the development of critical consciousness and reflexivity.

Participants also referred to the demands for homogenization of education through the import of traditional models and standards to places with different socio-political characteristics or resources. As such, an integration of critical perspectives may benefit occupational therapy education by supporting the development of more complex understandings of occupation that can make more sense to the context in which students are being trained. In turn, students would benefit from an education that prioritizes a deeper engagement with the predominating values, culture, and beliefs of their context. This recommendation is based on my own experience as a student in South America and from participants' accounts that point to the limitations that importing and teaching Westernized models of practice may impose on places where these values may not make sense.

Further, the findings of the critical dialogical study suggest potential limitations associated with approaches to education that consciously or unconsciously perpetuate a profession of individuals predominantly from a middle-class background. Based on this situation, participants highlighted the importance of enacting students' critical awareness of their own positionality within issues of power before participating in projects aligned with social transformative goals. Although raising awareness of the social background of students accessing occupational therapy education may not seem to be a solution, I

believe that along with efforts to enhance diversity among students, promoting awareness regarding this situation may serve as a foundation for enacting ways in which education may be strengthened to promote justice inside and outside the classroom.

7.6 Concluding remarks

The broader intent of this critical work was to inform further development of occupation-based transformative scholarship aligned with critical epistemology. As such, I believe that there are many generative possibilities for future research examining the epistemological foundations, discourses, and contextual factors that shape occupation-based research and practice. I also believe that this work has the potential to reflexively advance occupation-based work toward directions that align with social transformative and justice goals.

Most importantly, this critical scholarship adds to a much larger scholarly movement that seeks to move beyond traditional frameworks of research and practice and question the role of occupational science and therapy in society (Frank, 2012; Galheigo, 2011; Whiteford & Hocking, 2012). Given the limited number of studies addressing transformative scholarship in relation to occupational therapy and science (Frank & Zemke, 2008; Laliberte Rudman, 2014; Sakellariou & Pollard, 2017; Townsend, 1997; Watson & Swartz, 2004), it is apparent that further discussion is required to elucidate the potential possibilities in which this scholarship can help us mobilize occupation in ways that align with social justice and transformative purposes. Consequently, this critical scholarship forefronts key epistemological, methodological, discursive, and practical issues that require further dialogue and critical examination, and provides one step forward in promoting new ways of thinking and doing practices related to occupation.

7.7 References

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Appendices

Appendix A: Western University Non-Medical Research Ethics Board Approval



Research Ethics

**Western University Non-Medical Research Ethics Board
NMREB Delegated Initial Approval Notice**

Principal Investigator: Dr. Debbie Rudman
Department & Institution: Health Sciences/Occupational Therapy,

NMREB File Number: 108018
Study Title: Promoting critical dialogue to advance occupational therapy and occupational science toward social justice goals

NMREB Initial Approval Date: June 09, 2016
NMREB Expiry Date: June 09, 2017

Documents Approved and/or Received for Information:

Document Name	Comments	Version Date
Western University Protocol	Received May 24, 2016	
Recruitment Items	Email invitation English Version Received May 24, 2016	
Recruitment Items	Email Invitation Spanish Version Received May 24, 2016	
Letter of Information & Consent	English version	2016/05/24
Letter of Information & Consent	Spanish Version	2016/05/24
Instruments	Interview guide English version Received May 24, 2016	
Instruments	Interview guide Spanish Version Received May 24, 2016	


The Western University Non-Medical Research Ethics Board (NMREB) has reviewed and approved the above named study, as of the NMREB Initial Approval Date noted above.

NMREB approval for this study remains valid until the NMREB Expiry Date noted above, conditional to timely submission and acceptance of NMREB Continuing Ethics Review.

The Western University NMREB operates in compliance with the Tri-Council Policy Statement Ethical Conduct for Research Involving Humans (TCPS2), the Ontario Personal Health Information Protection Act (PHIPA, 2004), and the applicable laws and regulations of Ontario.

Members of the NMREB who are named as Investigators in research studies do not participate in discussions related to, nor vote on such studies when they are presented to the REB.

The NMREB is registered with the U.S. Department of Health & Human Services under the IRB registration number IRB 00000941.

Ethics Officer:  B Chair or delegated board member

Ethics Officer: Erika Basile ___ Nicole Kanikr ___ Grace Kelly ___  Katelyn Harris ___ Vikki Tran ___ Karen Gopaul ___

Appendix B: Email invitation to participants

School of Occupational Therapy

Dear (name)

We are looking for participants for a study on “Promoting critical dialogue to advance occupational therapy and occupational science toward social justice goals”. This study is being completed by Lisette Farias as part of her doctoral work at Western University, with Debbie Rudman as her supervisor. Specifically, in this study we seek to promote dialogue and reflection regarding the challenges and opportunities that arise when trying to enact social transformation and social justice goals through occupational therapy and occupational science projects. In particular, the objectives of this study include; a) identifying opportunities and challenges related to the emergence and development of projects that attempt to address the complexities of people’s everyday life, such as poverty and material life circumstances, b) examining how practitioners/scholars think about and act in relation to such opportunities and challenges, and c) enhancing understanding of how these challenges and opportunities are negotiated between practitioners/scholars themselves, and the individuals and communities with whom they work. Ultimately, we hope that the results of this study will build on and contribute to the emerging efforts that seek to work toward more critical and reflexive ways to address issues of injustice in occupational therapy and science. For further information, an abstract for the study is attached to this invitation.

Study participation will consist of taking part in 3 dialogical interviews with Lisette, with each interview lasting between 60 to 90 minutes. In these interviews, you will be asked to describe projects you have been involved in and reflect on the tensions that may emerge between the values and beliefs that are fundamentally important for the goals of social justice and social transformation and the epistemological frames used to enact them. To enable in-depth dialogue, you can choose to engage in a process of pre-reflection. If you choose to engage in this pre-reflection process, a brief document (6 pages or less) will be

sent to you prior to the second and third interview. The document will contain quotes drawn from your previous interview along with Lisette's reflective notes. Data collection can occur virtually or in-person, depending on your location, and the times of all sessions will be set by participants. If instead of a larger 60 to 90 minutes interview you require two smaller interview sessions, this can be accommodated. Due to the public nature of your work, we will not be able to guarantee anonymity, however steps will be taken to support the confidentiality of the data that you share.

You are being asked to participate based on your previous and/or current experiences within projects aligned with social justice and transformative goals. Please let us know if you are interested in participating in this study and/or if you would like to discuss the details of this project. If you cannot take part in the study, please provide publicly available contact information of people you think are important for us to invite into this study. Thank you for your consideration. We look forward to hearing from you.

Sincerely,

Lisette Farias, PhD Candidate



Graduate Program Health and
Rehabilitation Sciences, Western
University

Debbie Laliberte Rudman, PhD



Associate Professor, School of Occupational
Therapy, Western University

Appendix C: Abstract of the study attached to Email invitations

School of Occupational Therapy

Abstract

The proposed study seeks to critically examine emerging projects within occupational therapy and science that attempt to address global inequities in relation to structural contexts, and sociopolitical processes that extend beyond the individual and shape possibilities for people's participation in society. This increasing focus on social justice in occupational therapy and science echoes the calls for work toward a more just society across other health related disciplines such as nursing (Kagan, Smith & Chinn, 2014; Reimer-Kirkham & Browne, 2006) and counselling psychology (Toporek, Gerstein, Fouad, Roysircar, & Israel, 2006; Vera & Speight, 2003). In particular, occupational therapy and science are at a crucial moment characterized by critical reflexivity regarding their shared foundational assumptions and calls for embracing the potential and social responsibility of the profession and discipline to address social inequities (Kronenberg, Simo Algado, & Pollard, 2005; Townsend & Wilcock, 2004; Whiteford & Hocking, 2012).

As a result of these calls, several authors have raised concerns regarding the limits that the historical predominance of an individualistic and positivist frame within health knowledge imposes when trying to understand the complex socio-political nature of inequities (Galheigo, 2011; Hocking, 2012; Laliberte Rudman, 2015; Magalhães, 2012; Malfitano, Lopes, Magalhães & Townsend, 2014). In parallel, several projects have emerged outside the health system expanding the professional capacity to address socio-political determinants of injustices and enact diverse epistemological and methodological approaches (Galheigo, 2011; Galvaan & Peters, 2014; Kronenberg, Pollard & Sakellariou, 2011; Malfitano, Lopes, Magalhães & Townsend, 2014; Pollard, Sakellariou & Kronenberg, 2008). However, reaching beyond biomedicine and treating pathologies to address disparities has placed scholars and practitioners at an uneasy crossroads

(Galheigo, 2011; Pollard & Sakellariou, 2014; Watson & Swartz, 2004). As articulated by Frank and Zemke (2008) “addressing this set of concerns – the unevenness of global wealth, differentials in the protection of human rights and obstacles to the exercise of personal agency and political power – represents an upheaval in thinking and action within the occupational therapy profession” (p. 112). For example, several questions and issues have been forwarded as requiring immediate dialogue within the profession and discipline: what kinds of knowledge are relevant and useful for occupation-based approaches to social transformation? What competences will occupational therapists and scientists need to practice in social and political arenas? (Frank & Zemke, 2008) How can we ‘best’ address the social inequities that are being deconstructed and critiqued? (Farias & Laliberte Rudman, 2014; Farias, Laliberte Rudman, & Magalhães, 2014).

On the basis of these questions, practitioners and scholars have argued for the need to enact critical examinations of the practices and perspectives being used within the international projects that are emerging in response to the calls for promoting social transformation and justice (Barros, Lopes, Galheigo, & Galvani, 2011; Frank & Zemke, 2008; Galheigo, 2011b). Thus, in the enthusiasm for the ideals represented by social justice and transformative discourses, there is a need for research that promotes dialogue and reflection to ensure critical awareness of directions taken in the field and how these enable and/or face limitations to effectively addressing social inequities.

Appendix D: Spanish Version of Email invitation to participants

School of Occupational Therapy

Estimada/o (nombre)

Buscamos participantes para el estudio “Promoción de un dialogo crítico para el avance en la terapia ocupacional (TO) y la ciencia de la ocupación (CO) hacia objetivos de justicia social”. Este estudio es conducido por Lisette Farías como parte de su tesis doctoral en la Universidad de Western, con Debbie Rudman como su supervisora. Específicamente, este estudio busca promover el diálogo y reflexión sobre los desafíos y oportunidades que surgen cuando se trata de promover la transformación social y los objetivos de justicia social a través de proyectos de TO y CO. En particular, los objetivos de este estudio incluyen; a) identificar oportunidades y desafíos relacionados con la aparición y el desarrollo de proyectos que intentan abordar las complejidades de la vida cotidiana de las personas, tales como la pobreza, y otras circunstancias materiales., b) examinar cómo las/os profesionales e investigadoras/es piensan y actúan en relación a este tipo de oportunidades y desafíos, y c) mejorar la comprensión de cómo negocian estos desafíos y oportunidades las/os profesionales y académicos consigo mismos, y con los individuos y las comunidades con las que trabajan. En última instancia, esperamos que los resultados de este estudio desarrollarán y contribuirán a los esfuerzos emergentes que tratan de trabajar hacia formas más críticas y reflexivas para abordar los problemas de la injusticia en la TO y CO. Para más información, un resumen para el estudio se adjunta a la presente invitación.

Su participación en el estudio consistirá en 3 entrevistas dialógicas con Lisette, cada entrevista durará entre 60 a 90 minutos. En estas entrevistas, se le pedirá que describa los proyectos en los cuales ha participado y reflexionar sobre las tensiones que pudiesen surgir entre los valores y creencias que son fundamentales para los objetivos de la justicia social y la transformación social y los marcos epistemológicos utilizados para promover estos objetivos. Para promover un diálogo en profundidad, usted puede optar por

participar en un proceso de pre-reflexión. Si decide participar en este proceso de pre-reflexión, un breve documento (6 páginas o menos) será enviado a usted antes de la segunda y tercera entrevista. El documento contendrá citas extraídas de la(s) entrevista(s) anterior(es), junto con reflexiones de Lisette. La recolección de datos se puede producir virtualmente o en persona, dependiendo de su ubicación, y la hora/día de las sesiones serán fijadas por usted. Si en lugar de una entrevista de 60 a 90 minutos, usted necesita dos sesiones de entrevistas más cortas, esto puede ser acomodado. Debido a la naturaleza pública de su trabajo, las investigadoras no podemos garantizar su anonimato, sin embargo, se tomarán medidas para apoyar la confidencialidad de los datos que nos comparta.

Se le está pidiendo participar debido a sus experiencias previas y/o actuales en proyectos alineados con los objetivos de justicia social y transformación social. Por favor, háganos saber si usted está interesada/o en participar en este estudio y/o si le gustaría discutir los detalles de este proyecto. Si usted no puede participar en el estudio, por favor háganos llegar información pública de la(s) persona(s) que usted cree son importantes que nosotros las/los invitemos a participar en este estudio. Gracias por su consideración. Esperamos con interés escuchar de usted.

Sinceramente,

Lisette Farias, PhD Candidate

████████████████████

Graduate Program Health and
Rehabilitation Sciences, Western
University

Debbie Laliberte Rudman, PhD

████████████████████

Associate Professor, School of Occupational
Therapy, Western University

Appendix E: Spanish Version of Abstract of the study attached to Email invitations

School of Occupational Therapy

Resumen

El presente estudio tiene por objeto examinar críticamente los proyectos emergentes dentro de la terapia ocupacional y la ciencia de la ocupación que intentan abordar las desigualdades globales en relación a los contextos estructurales y los procesos sociopolíticos que se extienden más allá de los individuos y que dan forma a las posibilidades que las personas tienen para participar en la sociedad. Este creciente interés en la justicia social en terapia ocupacional y ciencia de la ocupación refleja llamadas que han hecho otras disciplinas relacionadas con la salud, como enfermería (Kagan, Smith & Chinn, 2014; Reimer-Kirkham y Browne, 2006) y psicología (Toporek, Gerstein, Fouad, Roysircar, e Israel, 2006; Vera y Speight, 2003) para trabajar hacia una sociedad más justa. En particular, la terapia ocupacional y ciencia de la ocupación están en un momento crucial caracterizado por la reflexividad crítica con respecto a sus premisas básicas comunes y el llamado para adoptar la responsabilidad social de la profesión y disciplina para hacer frente a las desigualdades sociales (Kronenberg, Simo Algado, y Pollard, 2005; Townsend y Wilcock, 2004; Whiteford y Hocking, 2012).

Como resultado de este llamado, varios autores han expresado su preocupaciones con respecto a los límites que el predominio histórico de un marco individualista y positivista dentro del conocimiento de la salud impone cuando se trata de comprender la compleja naturaleza socio-política de las desigualdades (Galheigo, 2011; Hocking, 2012; Laliberte Rudman, 2015; Magalhães, 2012; Malfitano, Lopes, Magalhães y Townsend, 2014). Paralelamente, varios proyectos han surgido fuera del sistema de salud, expandiendo la capacidad profesional de los terapeutas ocupacionales para abordar los determinantes socio-políticos de las injusticias y promover diversos enfoques epistemológicos y metodológicos (Galheigo, 2011; Galvaan y Peters, 2014; Kronenberg, Pollard y Sakellariou, 2011; Malfitano, Lopes, Magalhães y Townsend, 2014; Pollard, Sakellariou y Kronenberg, 2008). Sin embargo, expandirse más allá de la biomedicina y el

tratamiento de patologías para abordar disparidades sociales ha situado a académicos y profesionales en una encrucijada incómoda (Galheigo, 2011; Pollard y Sakellariou, 2014; Watson y Swartz, 2004). Como lo articula Frank y Zemke (2008) “abordar este conjunto de preocupaciones - la desigualdad de la riqueza mundial, las diferencias en la protección de los derechos humanos y los obstáculos para el ejercicio de la acción personal y el poder político - representa una alteración/choque en el pensamiento y acción dentro de la profesión de terapia ocupacional”(p. 112). Por ejemplo, varias preguntas y temas han sido expresados, requiriendo un diálogo inmediato dentro de la profesión y disciplina: ¿Qué tipo de conocimiento son relevantes y útiles para enfoques basados en la ocupación y la transformación social? ¿Qué competencias necesitarán las/os terapeutas ocupacionales y científicos de la ocupación para ejercer en los ámbitos sociales y políticos? (Frank & Zemke, 2008) ¿Cómo podemos abordar “de la mejor manera” las desigualdades sociales que están siendo de-construidas y criticadas? (Farías y Laliberte Rudman, 2014; Farías, Laliberte Rudman, y Magalhães, 2014).

Sobre la base de estas preguntas, profesionales y académicos han discutido la necesidad de apoyar un análisis crítico de las prácticas y las perspectivas que se utilizan en los proyectos internacionales que están surgiendo en respuesta a los llamados que promueven la transformación social y la justicia (Barros, Lopes, Galheigo, y Galvani, 2011; Frank & Zemke, 2008; Galheigo, 2011b). Por lo tanto, en el entusiasmo por los ideales representados por la justicia social y los discursos de transformación, se requiere de investigaciones que promuevan el diálogo y la reflexión para asegurar una conciencia crítica de las direcciones tomadas en la disciplina y cómo éstas permiten y/o limitan el aborde efectivo de desigualdades sociales.

Appendix F: Letter of Information



School of Occupational Therapy

Study Title: Promoting critical dialogue to advance occupational therapy and science toward social justice goals

Principal researchers:

Dr. Debbie Rudman, PhD, OT Reg. (ON)
Associate Professor, School of Occupational
Therapy
Western University

Phone:

Email:

Lisette Farias, PhD Candidate, OT Reg
Graduate program in Health and Rehabilitation
Sciences, Field of Occupational Science
Western University

Phone:

Email:

You are invited to participate in this study that seeks to promote dialogue and reflection regarding the challenges and opportunities that may arise when trying to enact social transformation and social justice goals through occupational therapy and occupational science projects. This study aims to learn about how practitioners and scholars think about and act in relation to such opportunities and challenges, and how they negotiate these between practitioners/scholars themselves, and the individuals and communities with whom they work. This study also intends to build on and contribute to the emerging efforts that seek to work toward more critical and reflexive ways to address issues of injustice in occupational therapy and science.

The purpose of this letter is to provide you with information required for you to make an informed decision regarding participation in this study. A total of 4 to 6 participants are being recruited worldwide. You are being asked to participate based on your previous and/or current experiences within projects aligned with social justice and transformative goals.

What will I have to do if I choose to take part?

You will be asked to take part in three dialogic interview sessions. Dialogic interviews are chosen given that their purpose is to understand complex and taken-for-granted situations, beliefs and practices that may interact with and shape your situated practices/projects and goals of social justice (Knight & Saunders, 1999). To stimulate description as well as space for reflection of your experiences and ways of thinking about your practice, this type of interview is less structured than typical interviews (Bogdan & Biklen, 2007; Wengraf, 2001). This will ensure that, consistent with a critical dialogical approach, interviews will be flexible and promote a two-way discussion regarding issues perceived by you and the interviewer as important and affecting the researchers' and your

professional and scholarly interests (Knight & Saunders, 1999; Oakley, 1981; Woods, 1986). Dialogic interviews will be conducted through a two-stage process: a first stage of open “description of the situation” and a second stage of “analysis”. In the first stage of “description of the situation” the interviewer will ask you a general over-arching descriptive question to initiate the description of your experiences. In the second stage of “analysis”, the interviewer will draw on what was told in the first stage and on her doctoral work to ask questions that explore significant dimensions that may shape this reality (e.g. the influence of contextual forces and professional discourse on your practice/projects).

Each interview will last between 60 to 90 minutes and will take place at a time and place of your choosing. If instead of a longer 60 to 90 minutes interview you require two shorter interview sessions, this can be accommodated. Since you may be located in a different location/country than the researchers, most of data collection sessions will be conducted through Skype or Uberconference program for Web Conference meeting. If you are located in Canada, the researchers will try to meet in person for conducting at least one interview. If you are located outside of Canada, the researchers will ask you if you are attending any international conferences this year in order to see if it would be possible to meet you at least once in person. To optimize the accuracy of data collection, we would like to audio-record the interviews. If you do not wish to be audio-recorded, hand-written notes will be taken by the interviewer during each session.

In addition, in order to enact critical reflexivity during and after each session, we recommend that you to schedule sessions at least 2 to 3 weeks apart in order to allow time for the researchers to review all data collected prior each session. As well, you will be asked to take part in a process of pre-reflection. If you choose to engage in this pre-reflection process, a brief document (6 pages or less) will be sent to you prior to the second and third interview. The document will contain parts of your transcriptions from your previous interview along with the researcher’s reflective notes. The purpose of sharing the transcripts and the initial thoughts of the researchers is to democratize the data collection and analysis process, stimulate awareness in regard to issues emerging in the data, as well as to add another opportunity for reflection to the research process.

Are there any risks or discomforts?

There are no known or anticipated risks or discomforts associated with participating in this study. You are free to choose what you will and will not discuss. You may be concerned that the information you share regarding your work could negatively impact your access to future sites or collaboration in similar projects. You will have control over the amount of content and details shared in the interviews. You will be offered copies of full interview transcripts and/or notes taken during your interviews to provide you with an opportunity, if you so choose, to voice any concerns you may have regarding how your accounts are being represented. In addition, if you choose to engage in a pre-reflection process, parts of your transcripts and copies of the researchers’ initial thoughts and reflections will be sent to you previous to data collection sessions 2 and 3 in order to support a reflective process and provide you with an opportunity to identify information

that you might not want to be included in publications and presentations based on this study.

What are the benefits of taking part?

You may not directly benefit from participating in this study. Your participation may help us gain new knowledge regarding the challenges and opportunities that may arise when trying to work toward more critical and reflexive ways to address issues of inequity and, in turn, further efforts to develop justice-oriented work. It is expected that a critical dialogue regarding the challenges and opportunities that may rise in practice will contribute to increased awareness of the need to include critical reflection processes within projects that aim to enact practices and processes aligned with social justice and social transformation goals.

What happens to the information shared?

All research data will be stored in a securely locked office at Western University and accessible only to the investigators of this study. **Due to the public nature of your work (e.g. the description of your work/projects can reasonably be expected to identify you), we will not be able to guarantee anonymity. However, steps will be taken to support the confidentiality of the data that you share.** We will support your confidentiality to the extent possible when presenting information, you share to others through publications and presentations (e.g. information will be presented in a way that does not link particular comments to particular participants). If we find information that we by law are required to disclose, we cannot guarantee confidentiality. All research data will be destroyed after 5 years. If you would like to review your full interview transcript or notes taken during your interview, please let the researchers know at the beginning of data collection session 1 to allow time for the researchers to transcribe your interview(s) or notes.

Audio Recording

For the purpose of data collection, audio recordings of interviews will be collected. You have the option to not be audio recorded. If you do not wish to be audio recorded, hand-written notes will be taken by the interviewer.

Voluntary Participation:

Participation in this study is voluntary. You may refuse to participate, refuse to answer any questions or withdraw from the study at any time. If you choose to withdraw from the study, any information that you have provided may still be used as part of the findings. Your decision to participate or not in this study will not affect your relationship with the researchers, or any aspect of your practitioner or academic status

Other Information about this Study:

If you have any questions or wish additional information, you may contact: Lisette Farias (Western University) at (██████████) or Dr. Debbie L. Rudman (Western

University) at (██████████). Representatives of Western University's Non-Medical Research Ethics Board may have access to all study-related information in order to check that the study is following the proper laws and regulations.

If you have any questions about the conduct of this study or your rights as a research participant, you may contact: Office of Research Ethics at the University of Western Ontario: (██████████).

This letter is for you to keep for future reference.

Appendix G: Consent Form

School of Occupational Therapy

Consent Form

Study Title: Promoting critical dialogue to advance occupational therapy and science toward social justice goals

I have read the Letter of Information, have had the nature of the study explained to me and I agree to participate. All of my questions have been answered to my satisfaction. You do not waive any legal right by signing this consent form.

Signature of Research

Date

Participant

Printed Name

Person Obtaining Informed Consent (please print):

Signature:

Date:

I consent to the audio recording of my interviews.

I consent to engaging in a process of pre-reflection, prior to the second and third interview, to reflect on parts of my interview transcriptions, and the researchers' initial thoughts.

Appendix H: Spanish Version of Letter of Information



School of Occupational Therapy

Carta de información

Título del estudio: Promoción de un dialogo crítico para el avance en la terapia ocupacional y la ciencia de la ocupación hacia objetivos de justicia social

Investigadoras principales:

Dr. Debbie Rudman, PhD, OT Reg. (ON)
Profesora asociada, Escuela de Terapia
Ocupacional
Universidad de Western Ontario
Teléfono (Canadá): (████████████████████)
Email: (████████████████████)

Lisette Farias, PhD (C), OT Reg
Programa de Ciencias de la Salud y de la
Rehabilitación, Ciencias de la Ocupación
Universidad de Western Ontario
Teléfono (Canadá): (████████████████████)
Email: (████████████████████)

Usted ha sido invitada/o a participar en este estudio que busca promover el diálogo y la reflexión sobre los desafíos y oportunidades que pueden surgir cuando se trata de fomentar la transformación social y los objetivos de justicia social a través de proyectos de terapia ocupacional y ciencia de la ocupación. Este estudio tiene como objetivo aprender cómo los profesionales y académicos piensan y actúan en relación a dichas oportunidades y desafíos, y cómo éstos negocian estas oportunidades y desafíos entre ellas/os mismas/os, y con los individuos y las comunidades con las que trabajan. Este estudio también tiene la intención de construir y contribuir a los esfuerzos emergentes que tratan de trabajar hacia formas más críticas y reflexivas para abordar los problemas de la injusticia desde la terapia ocupacional y la ciencia de la ocupación.

El propósito de esta carta es proporcionarle la información necesaria para que usted pueda tomar una decisión informada acerca de su participación en este estudio. Un total de 4 a 6 participantes están siendo reclutados en todo el mundo. Se le está pidiendo participar en base a sus experiencias previas y/o actuales dentro de proyectos alineados con los objetivos de justicia social y de transformación social.

¿Qué voy a tener que hacer si decido participar?

Se le pedirá participar en tres sesiones de entrevistas dialógicas. Las entrevistas dialógicas se eligieron teniendo en cuenta que su propósito es comprender situaciones complejas que ‘se dan por sentado’, creencias y prácticas que pueden interactuar y dar forma a sus prácticas/proyectos y objetivos de justicia social (Knight y Saunders, 1999). Como una manera de dar un enfoque descriptivo, así como dar espacio para la reflexión de sus experiencias y formas de pensar acerca de su práctica, este tipo de entrevista es

menos estructurada que las entrevistas típicas (Bogdan y Biklen, 2007; Wengraf, 2001). Esto asegurará que, en consonancia con un enfoque dialógico crítico, las entrevistas sean flexibles y promuevan una discusión de dos-vías acerca de los problemas percibidos por usted y por la entrevistadora como importantes, y que afectan los intereses de las investigadoras y sus intereses profesionales y académicos (Knight & Saunders, 1999; Oakley, 1981; Woods, 1986). Las entrevistas dialógicas se llevarán a cabo a través de un proceso de dos etapas: una primera etapa de “descripción de la situación” y una segunda etapa de “análisis”. En la primera etapa de descripción de la situación, la entrevistadora le hará una pregunta descriptiva general para iniciar la descripción de sus experiencias. En la segunda etapa de análisis, la entrevistadora se basará en lo que se dijo en la primera etapa y en su trabajo de doctorado para hacer preguntas que exploran dimensiones significativas que pueden dar forma a su realidad/contexto (ej. la influencia del contexto y discurso profesional en su prácticas/proyectos).

Cada entrevista tendrá una duración de entre 60 a 90 minutos y se llevará a cabo en el día, hora y lugar de su elección. Si en lugar de una entrevista de 60 a 90 minutos usted requiere dos sesiones de entrevistas más cortas, esto también se puede arreglar. Es posible que usted se encuentre en una zona/país diferente al de las investigadoras, por lo tanto la mayor parte de las sesiones de recolección de datos se llevará a cabo a través del programa Skype o Uberconference. Si usted se encuentra en Canadá, las investigadoras tratarán de reunirse en persona para la realización de al menos una entrevista. Si usted se encuentra fuera de Canadá, las investigadoras le preguntará si asistirá a conferencias internacionales este año con el fin de ver la posibilidad de encontrarse al menos una vez en persona. Para optimizar la fidelidad de la recopilación de datos, nos gustaría grabar el audio de las entrevistas. Si no desea que su audio sea grabado, notas escritas a mano serán tomadas por la entrevistadora durante cada sesión.

Además, con el fin de promover la reflexividad crítica durante y después de cada sesión, se recomienda que usted programe sesiones con al menos 2 a 3 semanas de separación con el fin de darles tiempo a las investigadoras para revisar todos los datos recogidos antes de cada sesión. A su vez, se le pedirá a participar en un proceso de pre-reflexión. Si usted decide participar en este proceso de pre-reflexión, un breve documento (6 páginas o menos) será enviado a usted antes de la segunda y tercera entrevista. El documento contendrá partes de las transcripciones de la entrevista anterior, junto con notas de reflexión de la investigadora. El propósito de compartir las transcripciones y las ideas iniciales de las investigadoras es democratizar el proceso de recolección y análisis de datos, estimular la concientización de los asuntos/temas emergentes en los datos, así como añadir una nueva oportunidad para la reflexión al proceso de investigación.

¿Existe la posibilidad de riesgos o molestias asociadas a mi participación?

No hay riesgos o molestias conocidos o previstos asociados con su participación en este estudio. Usted es libre de elegir lo que quiera o no quiera discutir. Usted podría estar preocupado de que la información que compartirá con respecto a su trabajo podría influir negativamente en su acceso a futuros proyectos o colaboración en proyectos similares. Sin embargo, usted tendrá el control sobre la cantidad de contenido y datos compartidos en las entrevistas. Se le ofrecerá copias de las transcripciones de las entrevistas y/o notas

tomadas durante sus entrevistas para ofrecerle la oportunidad, si así lo desea, de expresar cualquier preocupación que pueda tener con respecto a cómo están representadas sus experiencias/relatos. Además, si decide participar en el proceso de pre-reflexión, partes de las transcripciones y copias de los pensamientos y reflexiones iniciales de las investigadoras serán enviados a usted antes de las sesiones 2 y 3, con el fin de apoyar un proceso de reflexión y proporcionarle una oportunidad para identificar la información que usted no desee que sea incluida en publicaciones y presentaciones basadas en este estudio.

¿Cuáles son los beneficios que obtendré por participar?

Usted no se beneficiará directamente por participar en este estudio. Su participación puede ayudarnos a obtener nuevos conocimientos sobre los desafíos y oportunidades que pueden surgir cuando se intenta trabajar hacia formas más críticas y reflexivas para abordar los asuntos de desigualdad y, a su vez, avanzar en los esfuerzos para desarrollar un trabajo orientado hacia la justicia social. Se espera que un diálogo crítico con respecto a los desafíos y oportunidades pueda surgir en la práctica y contribuir a una mayor concientización de la necesidad de incluir procesos de reflexión crítica en los proyectos que tienen como objetivo adoptar prácticas y procesos alineados con los objetivos de justicia social y de transformación social.

¿Qué sucederá con la información que he compartido?

Todos los datos de la investigación se almacenarán en una oficina cerrada con llave en la Universidad de Western y solo tendrán acceso a esta información las investigadoras de este estudio. **Debido a la naturaleza pública de su trabajo (ej. se puede razonablemente esperar que la descripción de su trabajo/proyectos puedan identificarla/o), no podemos garantizar su anonimato. Sin embargo, se tomarán medidas para respaldar la confidencialidad de los datos que comparta.** Vamos a respaldar su confidencialidad en la medida de lo posible cuando presentemos la información que usted ha compartido con otras personas a través de publicaciones y presentaciones (ej. la información se presentará de una manera que no se asocien comentarios específicos a participantes específicos). Si consideramos que alguna información que por ley estamos obligadas a revelar, no podremos garantizar su confidencialidad. Todos los datos de la investigación serán destruidos después de 5 años. Si desea revisar las transcripciones completas de sus entrevistas o notas tomadas durante la entrevista por favor, dé a conocer su deseo a las investigadoras al comienzo de la sesión 1 para dar tiempo a los investigadores de transcribir la/s entrevista/s o notas.

Grabación de audio:

Para los efectos de la recolección de datos, el audio de las entrevistas será grabado. Usted tiene la opción de no ser grabado. Si usted no desea que su audio sea grabado, notas escritas a mano serán tomadas por la entrevistadora.

Participación voluntaria:

Su participación en este estudio es voluntaria. Usted puede negarse a participar, negarse a responder cualquier pregunta o retirarse del estudio en cualquier momento. Si decide retirarse del estudio, cualquier información que nos haya proporcionado podría ser utilizada como parte de los resultados. Su decisión de participar o no en este estudio no afectará su relación con las investigadoras, o cualquier aspecto de su estatus profesional o académico.

Otra información sobre este estudio:

Si usted tiene alguna pregunta o desea información adicional, puede comunicarse con: Lisette Farías (Universidad de Western Ontario) al (████████████████████) o con Dr. Debbie L. Rudman (Universidad de Western Ontario) al (████████████████████). Los representantes de la Junta de Ética No Médica de investigación de la Universidad de Western Ontario pueden tener acceso a toda la información relacionada con el estudio con el fin de comprobar que el estudio está siguiendo las leyes y regulaciones apropiadas.

Si usted tiene alguna pregunta sobre la realización de este estudio o sus derechos como participante en la investigación, puede comunicarse con: Oficina de Ética de Investigación de la Universidad de Western Ontario: (████████████████████)

Esta carta es para usted y para futuras referencias.

Appendix I: Spanish Version of Consent Form

School of Occupational Therapy

Formulario de Consentimiento

Título del estudio: Promoción de un dialogo crítico para el avance en la terapia ocupacional y la ciencia de la ocupación hacia objetivos de justicia social

He leído la carta de la información, se me ha explicado la naturaleza del estudio y yo estoy de acuerdo en participar. Todas mis preguntas han sido contestadas satisfactoriamente. Usted no renuncia a ningún derecho legal al firmar este formulario de consentimiento.

Firma del/la participante

Fecha

Nombre impreso

La persona que obtiene el consentimiento informado (en letra de imprenta):

Firma:

Fecha: _____

- Doy mi consentimiento para la grabación de audio de las entrevistas.
- Doy mi consentimiento para participar en un proceso de pre-reflexión, antes de la segunda y tercera entrevista, para reflexionar sobre partes de mis transcripciones de las entrevistas, y los pensamientos iniciales de las investigadoras.

Appendix J: Dialogical interview Guide



School of Occupational Therapy

Interview Guide

Study Title: Promoting critical dialogue to advance occupational therapy and occupational science toward social justice goals

Introduction:

- Clarify any questions concerning the interview, the study, audio-recording, etc.
- Explain the informed consent and record the agreement to participate.
- Shortly introduce what the interview will consist of.
- Ask participants if they would like to receive a copy of their full interview transcripts.

Dialogical session 1

Purpose: The primary focus of this data collection session is to gain an initial description of the participants' experiences and ways of thinking and acting regarding the influence of contextual forces and professional discourse on their practice/projects.

First stage - Description of the situation: the interviewer will ask general over-arching descriptive questions and possible prompts to initiate the description of the participant's experiences from injustice-oriented projects.

Introductory questions: (Note. These questions are aimed to prompt in-depth description of the participant's work that he/she frames as transformative; depending on depth of answer to any question, one or more questions may be asked.)

- Could you tell me about the type of projects that you are or have been involved in?
- Could you tell me about the transformative nature of your project? (E.g. social transformative goals, social justice or occupational justice framework, etc.).
- Could you tell me about a project where there was a good fit between what you intended to do and what actually happened?

- Could you tell me about project where there was a mismatch between what you intended to do and what actually happened?

Possible Follow-up questions:

- What is/was the purpose/aims of this project?
- What activities/actions have been taken by individuals/groups to achieve the aims of the project?
- What kind of challenges/tensions have you encountered trying to initiate/develop this type of project?
- What kinds of opportunities have emerged associated to the initiation/development of the project?
- Has this project come to a clear end or has it continued over time? Who is supporting the continuation of the project?
- How did you manage ending or leaving the project? How did you promote sustainability of the project's mission/goals?

Second stage - Analysis: the interviewer will draw on what was told in the first stage to ask questions that explore significant dimensions of a participant's contextual reality and the interactions of the various components that may shape this reality (e.g. challenges, tensions, contradictions and opportunities).

Possible questions:

- Based on what you have told me, can you give me an example of [...]?
- Could you tell me more about what happened when [...]?
- What do you think was the reason for [...]? (e.g. issues, specific situation)
- What do you think was the cause or root of [...]?
- What do you think are the meaning(s) behind [...]?
- What does [...] mean to you in this context?
- What have you learned from [...]?
- What were the consequences of [...]?

Dialogical session 2

Purpose: The primary focus of the second data collection session is to gain an in-depth understanding of the issues surfaced in the first session and to provoke critical analysis of the situated opportunities and challenges associated to these issues. Furthermore, in this session we will begin exploring how the participants navigate diverse issues that may emerge in practice.

First stage- Description of the situation: In this session the interviewer will ask open-ended questions based on what was told in data collection session 1.

Introductory questions:

- After you read the material sent to you, did you have any reflections or questions that you would like to share?
- Would you like to add something to what you have told me in the first session?
- After reflecting on what we talked about in the last session, are there other examples of projects or issues that you would like to share with me?

Second stage - Analysis: the interviewer will draw on what was told in the first stage to ask questions that explore significant issues surfaced in sessions 1 and 2 and to introduce issues based on her doctoral work that have not surfaced in these sessions.

Possible questions:

- Based on what you have told me, could you tell me more about what happened when [...]?
- Reflecting on what you said about [...], could you tell me [...]?
- What do you think was the reason to [...]?
- What do you think was the cause or root of [...]?(e.g. issues, specific situations)
- How did you navigate/manage [...]? (e.g. funding, a place for conducting the project, incentive for participants, collaboration with organisations or groups)
- In what way does [...] influence your practice/context?
- What have you learned from [...]?
- What were the consequences of [...]?

Dialogical session 3

Purpose: The primary focus of the third data collection session is to critically reflect on how practitioners think about and act in relation to the issues surfaced in sessions 1 and 2, as well as to continue unpacking professional/disciplinary discourses about social justice that may both coexist and conflict in practice. Furthermore, in this session we will invite the participants to envision new possibilities or approaches for action, drawing on their experiences and reflections.

First stage- Description of the situation: The description stage will aim to clarify and elaborate on issues emerged in sessions 1 and 2, and thereby it will focus on unpacking these issues.

Introductory questions:

- Based on what you have told me, could you tell me more about what happened when [...]?
- Reflecting on what you said about [...], could you tell me more about [...]?

Second stage - Analysis: the interviewer will draw on what was told in this session and in sessions 1 and 2, and will introduce specific questions that arise from her doctoral work and reflections.

Possible questions:

- The researchers will generate these questions based on the analysis of sessions 1 and 2 and on the interviewer's reflections on her doctoral work and what was told in the interviews.

Envisioning new possibilities

- How do you envision the future when you think of [...]?
- If you could do it again, what would you change?

Appendix K: Spanish Version of Dialogical Interview Guide



School of Occupational Therapy

Guía de entrevista

Título del estudio: Promoción de un dialogo crítico para el avance en la terapia ocupacional y la ciencia de la ocupación hacia objetivos de justicia social

Introducción:

- Aclarar cualquier pregunta relacionada con la entrevista, el estudio, grabación de audio, etc.
- Explicar el consentimiento informado y registrar el consentimiento para participar.
- Introducir brevemente en lo que consistirá la entrevista.
- Preguntar al/la participante si le gustaría recibir una copia completa de las transcripciones de sus entrevistas.

Recolección de datos – sesión 1

Objetivo: El objetivo principal de esta sesión es la recopilación de datos para obtener una descripción inicial de las experiencias de los participantes y sus formas de pensar y de actuar con respecto a la influencia de los factores contextuales y el discurso profesional en su práctica/ proyectos.

Primera etapa - Descripción de la situación: la entrevistadora formulará preguntas generales y descriptivas, y probablemente utilizará gestos y palabras para iniciar la descripción de las experiencias de las/os participantes y sus proyectos orientados a la justicia.

Preguntas introductorias (Nota: Estas preguntas están dirigidas a inducir una descripción en profundidad de los proyectos que la/el participante enmarca como transformativo; dependiendo de la profundidad de la respuesta a cualquier pregunta, una o más preguntas serán utilizadas).

- ¿Podría contarme sobre el tipo de proyectos en los que usted ha estado o está involucrada/o?
- ¿Podría contarme sobre la naturaleza transformadora de su proyecto? (ej. objetivos de transformación social, la justicia social o marco justicia ocupacional, etc.).
- ¿Podría contarme sobre algún proyecto en el que ha habido una buena correlación entre lo que se intentó hacer y lo que realmente ocurrió?
- ¿Podría contarme sobre un proyecto en el que ha habido una falta de correspondencia entre lo que se intentó hacer y lo que realmente ocurrió?

Posibles preguntas de seguimiento:

- ¿Cuál es/era el propósito/objetivos de este proyecto?
- ¿Qué actividades/acciones han realizado los individuos/grupos para alcanzar los objetivos del proyecto?
- ¿Qué tipo de desafíos/tensiones se ha encontrado tratando de iniciar/desarrollar este tipo de proyectos?
- ¿Qué tipos de oportunidades han surgido asociadas a la iniciación/desarrollo del proyecto?
- ¿Ha llegado este proyecto a un final claro o se ha continuado en el tiempo?
¿Quién está apoyando la continuación del proyecto?
- ¿Cómo logró manejar el final del proyecto o su salida del mismo? ¿Cómo ha promocionado la sustentabilidad del propósito/objetivos del proyecto?

Segunda etapa - Análisis: la entrevistadora se basará en lo que se dijo en la primera etapa para hacer preguntas que exploren dimensiones significativas de la realidad contextual de la/el participante y las interacciones de los diversos componentes que dan forma a esta realidad (ej. desafíos, tensiones, contradicciones y oportunidades).

Posibles preguntas:

- Sobre la base de lo que me ha dicho, ¿me podría dar un ejemplo de [...]?
- ¿Me podría contar más acerca de lo que ocurrió cuando [...]?
- ¿Qué cree usted que fue el motivo de [...]? (ej. problemas, situación específica)
- ¿Qué cree usted que fue la causa o la raíz de [...]?
- ¿Qué cree usted que son el/los significado/s detrás de [...]?
- ¿Qué significa [...] para usted en este contexto?
- ¿Qué ha aprendido de [...]?
- ¿Cuáles fueron las consecuencias de [...]?

Recolección de datos – sesión 2

Objetivo: El objetivo principal de la segunda sesión de la recolección de datos es obtener una comprensión en profundidad de los temas que surgieron en la primera sesión y promover el análisis crítico de las oportunidades y los retos asociados a estos temas. Por otra parte, en esta sesión vamos a comenzar a explorar cómo los participantes navegan entre diversos problemas/situaciones que pueden surgir en la práctica.

Primera etapa - Descripción de la situación: En esta sesión, la entrevistadora formulará preguntas abiertas basadas en lo que se dijo en la primera sesión de recolección de datos.

Preguntas introductorias:

- Después de leer el material que le enviamos, ¿tuvo alguna reflexión/es o pregunta/s que le gustaría compartir?
- ¿Le gustaría añadir algo a lo que me ha contado en la primera sesión?
- Después de reflexionar sobre lo que hablamos en la última sesión, ¿hay otros ejemplos de proyectos o temas que le gustaría compartir conmigo?

Segunda etapa - Análisis: la entrevistadora se basará en lo que se dijo en la primera etapa para formular preguntas que exploran temas importantes que surgieron en las sesiones 1 y 2 e introducir temas basados en su trabajo de doctorado que no han salido a la superficie en estas sesiones.

Posibles preguntas:

- Sobre la base de lo que me ha dicho, ¿podría contarme más acerca de lo que ocurrió cuando [...]?
- Al reflexionar sobre lo que dijo sobre [...], ¿me podría decir [...]?
- ¿Qué cree usted que fue la causa por la que [...]?
- ¿Qué cree usted que fue la causa o la raíz de [...]? (ej. problemas, situación específica)
- ¿Cómo gestionó [...]? (ej., la financiación, un lugar para la realización del proyecto, incentivo para los participantes, la colaboración con las organizaciones o grupos)
- ¿De qué forma influyo/influye [...] en su práctica/contexto?
- ¿Qué ha aprendido de [...]?
- ¿Cuáles fueron las consecuencias de [...]?

Recolección de datos – sesión 3

Objetivo: El objetivo principal de la tercera sesión de la recolección de datos es reflexionar críticamente sobre cómo los profesionales piensan y actúan en relación a las tensiones/problemas que surgieron en las sesiones 1 y 2, y continuar analizando discursos profesionales/disciplinarios sobre la justicia social que puede tanto coexistir como contradecir/chocar en la práctica. Además, en esta sesión se invitará a las/os participantes a imaginar/visualizar nuevas posibilidades o enfoques para la acción/práctica, a partir de sus experiencias y reflexiones.

Primera etapa - Descripción de la situación: Esta etapa tendrá como objetivo el clarificar y elaborar/explicar en detalle aspectos que surgieron en las sesiones 1 y 2, y por lo tanto se centrará en el análisis de estos temas.

Preguntas introductorias:

- Sobre la base de lo que me ha contado, ¿podría decirme más acerca de lo que ocurrió cuando [...]?
- Al reflexionar sobre lo que dijo sobre [...], ¿podría decirme más acerca de [...]?

Segunda etapa - Análisis: la entrevistadora se basará en lo que se dijo en esta sesión y en las sesiones 1 y 2, e introducirá preguntas específicas que se derivan de su trabajo de doctorado y reflexiones.

Posibles preguntas:

- Las investigadoras generarán estas preguntas basadas en el análisis de las sesiones 1 y 2 y en las reflexiones de la entrevistadora basadas en su trabajo de doctorado y lo que se dijo en las entrevistas.

Imaginando/Visualizando nuevas posibilidades

- ¿Cómo ve el futuro cuando piensa en [...]?
- Si pudiera hacerlo de nuevo, ¿qué cambiarías?

Appendix L: Certificate of Translation

Certificate of Translation

REB ID#: 108018

Principal Investigators: Dr. Debbie Rudman and Lisette Farias, PhD Candidate

Statement:

I, Javier Sepulveda (PhD candidate in Hispanic studies in the Modern Languages and Literatures department at Western University) declare that I am fluent in and understand the English language and the Spanish language.

The Spanish version of the following documents; Invitation Email, Letter of Information and Consent, and Interview Guide, dated May 24th, 2016 are true and accurate translations of the English material dated May 19th, 2016.

Name (Print): Javier Sepúlveda

Address: [REDACTED]

Phone No.: [REDACTED] E-mail: [REDACTED]

[REDACTED] 24/05/16

Signature

Date

Appendix M: Analysis Sheet

Questions: what is present, what is absent and what could be present.

1. Informed by theory (Freire 1970; Santos, 2014)

Key concepts from Freire and Santos: *Conscientization, Praxis, Cognitive justice, Ecology of knowledge, Sociology of absences and emergences, Abyssal thinking, Neoliberal context*

Professional, educational, research level

- What type of knowledge is preferred/privileged within the data? And how does this type of knowledge relate to occupational therapy and science? How does this type of knowledge shape (advance/hinder) occupation-based social transformative work?
- What are the types of practices that are promoted as ideal? What are the professional discourses and assumptions that support/privilege these practices?
- What forms and types of knowledge and assumptions guide/underpin the work that is being put forward for groups that experience social injustices?
- What issues are presented as ideal or not possible to address?
- What forms and types of work/practice are presented as ideal for groups that experience social disadvantages?
- What types of knowledge, ideas and assumptions could support and advance this type of work/practice in ways that align with social transformation and justice goals, but are not present?

Community, organizational level

- How participants negotiate power relations with community members, volunteers and institutions?
- Who is proposing the solutions? Who is included and who isn't?
- What issues are presented as ideal or not possible to address from institutions and community organization?

2. Informed by research questions

Occupation-based social transformative work

- How is this work conceptualized (e.g. as different from or similar to mainstream occupation-based practices, characteristics/features)? How do they define their work and themselves (e.g. as not OTs, as an exception, marginalized, etc.)?
- Who is able or not able to engage in it?

- Who is proposing this type of work? (e.g. status, geographical location)
 - What types of situations/issues are presented as social issues? What social problems are to be alleviated and what social transformative/justice goals are to be achieved?
 - Who is likely to benefit from promoting an occupation-based social transformative agenda?
 - What is to be transformed within the work? (e.g. social issues embedded in systems, norms, policies, or issues that fall back into fixing the individual to adjust to a social issue)
 - What types of outcomes are constructed as ideals when working toward social transformative and justice goals?
 - What resources are required to develop and engage in occupation-based social transformative work?
 - What is to be avoided within occupation-based social transformative work?
 - What is absent with regards to the ways this type of work is conceptualized or constructed?
3. Informed by methods for deconstruction and contextualization (Jäger & Maier, 2009)
- What is/are the context(s) of the participants' practice/projects?
 - What is the position and status of the participants within the context of their practice/projects?
 - What issues are similar or related across the contexts of the participants?
 - What issues are atypical/different across the contexts of the participants?
 - What actors are mentioned, and how are they portrayed (e.g. students, social workers)?

Appendix N: Copyright Permission for Chapter 2

Request for Permission to Use Copyrighted Material in a Doctoral Thesis



Clare Hocking <[REDACTED]>

Yesterday, 6:53 PM

Lisette Eloisa Farias Vera ↕

OK, so I am happy to give you copyright permission to insert the article
Best wishes for the examination process
Clare

...

From: Lisette Eloisa Farias Vera <[REDACTED]>
Sent: Friday, 30 June 2017 6:10 AM
To: Clare Hocking <[REDACTED]>
Subject: {Spam?} Request for Permission to Use Copyrighted Material in a Doctoral Thesis

Dear Prof. Hocking,

I am writing to request permission to include the following material in my Doctoral thesis entitled "Advancing social transformation through occupation: A critical examination of epistemological foundations, discourses and contextual factors shaping research and practice".

**Farias, L., & Laliberte Rudman, D. (2016). A Critical Interpretive Synthesis of the Uptake of Critical Perspectives in Occupational Science. Journal of Occupational Science, 23(1), 33-50.
doi:10.1080/14427591.2014.989893**

My thesis will be available in full-text on the internet for reference, study and / or copy. Except in situations where a thesis is under embargo or restriction, the electronic version will be accessible through the Western Libraries web pages, the Library's web catalogue, and also through web search engines. I will also be granting Library and Archives Canada and ProQuest/UMI a non-exclusive license to reproduce, loan, distribute, or sell single copies of my thesis by any means and in any form or format. These rights will in no way restrict republication of the material in any other form by you or by others authorized by you.

The material will be attributed through a citation.

Please confirm in writing or by email that these arrangements meet with your approval.

Sincerely,

Lisette Farias

Appendix O: Copyright Permission for Chapter 3

Copyright permission for OTJR



Mindy Hecker <[REDACTED]>
Yesterday, 4:03 PM
Lisette Eloisa Farias Vera ✉



Reply all | ▾



July 10, 2017

Lisette Farias Vera, Ph.D. Candidate, MScOT, BScOT, OT Reg.
Graduate Program in Health and Rehabilitation Sciences, Field of Occupational Science
Faculty of Health Sciences
Western University
[REDACTED]

Dear Ms. Farias Vera:

Permission is hereby granted for you to include the following article in your thesis:

Farias, L., Rudman, D. L., & Magalhães, L. (2016). Illustrating the Importance of Critical Epistemology to Realize the Promise of Occupational Justice. OTJR: Occupation, Participation and Health, 36(4), 234-243. doi:10.1177/1539449216665561

The request is approved on the conditions:

Acknowledgment is made of the source of the material using the following format: from (title), by (author's name). Copyright (date) by the American Occupational Therapy Foundation. Reprinted with permission.

References must be cited whenever included as part of the material to be reprinted or posted on the internet as this ensures the integrity of the original research. Note that reprint use must also acknowledge AOTF as copyright holder.

Sincerely,

[REDACTED]

Mindy A. Hecker, MBA, MLS
Director of Information Resources

Appendix P: Copyright Permission for Chapter 4

Permission to reprint article



Linda Liebenberg <[REDACTED]>

Today, 11:03 AM

Lisette Eloisa Farias Vera; [REDACTED]



Reply all | v

Flag for follow up.

Dear Lisette

I hereby provide permission for you to include the following material in your thesis:

Farias, L., Rudman, D. L., Magalhães, L., & Gastaldo, D. (2017). Reclaiming the Potential of Transformative Scholarship to Enable Social Justice. *International Journal of Qualitative Methods*, 16(1), 1-10. doi:10.1177/1609406917714161

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Best of luck with finalizing your thesis and your future research endeavors.

Regards,
Linda

Linda Liebenberg, Ph.D.
Adjunct Professor, Faculty of Graduate Studies
Dalhousie University, Halifax NS, Canada
Editor (Americas and Africa), [International Journal of Qualitative Methods](#)
Tel: [REDACTED]
Email: [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Curriculum Vitae

Lisette Farias Vera

EDUCATION

Doctor of Philosophy in Health and Rehabilitation Sciences 2013- present

Occupational Science Field

Faculty of Health Sciences, Western University, Canada

Thesis title: Advancing social transformation through occupation: A critical examination of epistemological foundations, discourses and contextual factors shaping research and practice

Supervisor: Prof. Debbie Laliberte Rudman

Advisors: Dr. Lilian Magalhães and Dr. Denise Gastaldo

Certificate in University Teaching and Learning 2014-2016

Teaching Support Centre

Western University, Canada

Certificate in Academic and professional Communication 2013- 2014

Teaching Support Centre

Western University, Canada

European Master of Science in Occupational Therapy 2010-2012

Amsterdam University of Applied Sciences, The Netherlands

Thesis title: Unraveling the Family knot: Negotiating the layers of cultural values and identities enacted through everyday occupations of a family with migrant background in Sweden.

Supervisor: Dr. Eric Asaba

Occupational Therapy Professional Degree 2003-2008

Bachelor of Science in Human Occupation

Faculty of Medicine, University of Chile, Chile

Research Project title: Occupational Components assessed during the process of problematic drug abuse treatment and rehabilitation

Supervisor: Maria Elena Riveros, PhD Cand.

AWARDS, GRANTS, AND SCHOLARSHIPS

Society for the Study of Occupation, USA Student Research Grant in Occupational Science, \$450 USD 2016

Great Ideas for Teaching Award, Teaching Support Centre, \$100 CAD 2016

Faculty of Health Sciences Graduate Conference Travel Award, \$260 CAD 2016

Health & Rehabilitation Sciences Conference Travel Award, \$400 CAD 2016

AER Global Opportunities Award for Health Sciences, \$2,000 CAD	2015
Faculty of Health Sciences Graduate Conference Travel Award, \$425 CAD	2015
Health & Rehabilitation Sciences Conference Travel Award, \$500 CAD	2015
Canadian Society of Occupational Scientists Award in Student Scholarship, \$500 CAD	2014
Faculty of Health Sciences Graduate Conference Travel Award, \$500 CAD	2014
Health & Rehabilitation Sciences Conference Travel Award, \$500 CAD	2014
The Ontario Trillium Foundation Scholarship, \$40,000 CAD /year for up to 4 years	2013-2017
Western Graduate Research Scholarship, \$21,449 CAD /year over 4 years	2013-2017
Ontario Graduate Scholarship, \$15,000 CAD (Declined)	2013
Occupational Therapy Degree obtained with Highest Distinction, School of Occupational Therapy, University of Chile	2008
The Linnaeus–Palme Scholarship, 30,000 SEK	2007

RESEARCH CONTRIBUTIONS

SUMMARY

	Published	In press	Accepted	Submitted
Referred Papers				
In English	5			1
In Spanish	4	1		
Professional Papers	2			
Book Chapters				
In English		1		
In Spanish	2			
Referred Conference Presentations and Abstracts in Peer-reviewed Conference Proceedings	22		6	2

PUBLICATIONS

Referred Papers – In English

Farias, L., Laliberte Rudman, D., Pollard, N., Schiller, S., Malfitano, A. P., Thomas, K., & van Bruggen, H. Critical dialogical approach: A methodological direction for occupation-based social transformative work. *Scandinavian Journal of Occupational Therapy*, Manuscript submitted

Farias, L., Laliberte Rudman, D., Magalhães, L., & Gastaldo, D. (2017). Reclaiming the potential of transformative scholarship to enable social justice. *International Journal of Qualitative Methods*, 16(1), 1-10. doi:10.1177/1609406917714161

Nichols, B., Umana, K., Britton, T., **Farias, L.**, Lavalley, R., & Hall-Clifford, R. (2017). Transnational Information Politics and the “Child Migration Crisis”: Guatemalan NGOs Respond to Youth Migration. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 1-26. doi:10.1007/s11266-017-9890-9

Farias, L., Laliberte Rudman, D., & Magalhães, L. (2016). Illustrating the Importance of Critical Epistemology to Realize the Promise of Occupational Justice (Special issue on Occupation and Justice). *OTJR: Occupation, Participation and Health*. 36(4), 234-243. doi:10.1177/1539449216665561

Farias, L., & Laliberte Rudman, D. (2016). A critical interpretative synthesis of the uptake of critical perspectives in occupational science. *Journal of Occupational Science*, 23(1), 33-50. doi:10.1080/14427591.2014.989893

Farias, L., & Asaba, E. (2013). The family knot: Negotiating identities and cultural values through everyday occupations of an immigrant family in Sweden. *Journal of Occupational Science*, 20(1), 36-47. doi:10.1080/14427591.2013.764580

Referred Papers – In Spanish

Veiga Seijo, S., **Farias, L.**, & Rivas Quarneti, N. (In press) El trabajo precario como ocupación situada: Estudio exploratorio de experiencias de trabajadores en el contexto de crisis económica española [Precarious work as situated occupation: Exploratory study of workers' experiences in the context of Spanish economic crisis] (Special issue on Society and Work). *Cad. Ter. Ocup. UFSCar*.

González, L., Rivas-Quarneti, N., & **Farías, L.** (2016). Estudio de alcance de terapia ocupacional y drogodependencias: Reflexiones críticas de los contextos, prioridades y miradas en la investigación [A scoping review of Occupational Therapy literature on drug addiction: Critical reflections on contexts, priorities and research perspectives]. *Revista Chilena de Terapia Ocupacional*, 12(2), 9-21. doi:10.5354/0717-5346.2016.44747

Farias, L., & López, C. (2013). La formación de pregrado de Terapia ocupacional en Chile visto desde la perspectiva de los estudiantes: ¿Cuál es la percepción de necesidades que tienen los estudiantes de Terapia Ocupacional en relación a su proceso de formación? [Occupational Therapy undergraduate education in Chile seen from the students' perspective: What are students' perceptions of needs in relation their undergraduate education?] *Revista Chilena de Terapia Ocupacional*, 13 (1), 43-50. doi:10.5354/0717-6767.2013.27451

Fagnilli, J., & **Farias, L.** (2011). Sistematización de las experiencias del curso en línea “nuevas tecnologías y Terapia Ocupacional”: Nuevas competencias para la Terapia Ocupacional [Systematization of the experiences of the on line course “New Technologies and Occupational Therapy”: New Competences for Occupational Therapy]. *Revista Chilena de Terapia Ocupacional*, 11(1), 65-77. doi:10.5354/0717-6767.2011.17083

Farias, L., Guerra, V., Cifuentes, T., Rozas, S., & Riveros M. (2010). Consumo problemático de drogas y Terapia Ocupacional: Componentes Ocupacionales evaluados durante el proceso de tratamiento y rehabilitación [Problematic drug abuse and Occupational Therapy: Occupational Components assessed during the process of treatment and rehabilitation]. *Revista Chilena de Terapia Ocupacional*, 10, 45-56. doi:10.5354/0717-6767.2010.10559

Not-Referred Papers

Farias, L. (2017). Book Review: Rehabilitation: A post-critical approach. *Canadian Journal of Occupational Therapy*, 84(3), 199-199. doi:10.1177/0008417416664165

Farias, L. (2012). Experiencias de Terapeutas Ocupacionales trabajando en el extranjero: La influencia de la propia cultura en la práctica profesional [Experiences of Occupational Therapists working abroad: The influence of one's own culture on professional practice]. *Revista de Terapia Ocupacional Galicia, TOG A Coruña*, 9(15), 21.

Book Chapters

Nichols, B., & **Farias, L.** (In press) Maternal care in Guatemala: Problematizing discourses of development, transnational advocacy and indigeneity. In D. Schwartz (Ed.), *Maternal health, pregnancy-related morbidity and death among indigenous women of Mexico & Central America: An anthropological, epidemiological and biomedical approach*. City: Springer.

Farias, L & López, C. (2013). La formación de pregrado de Terapia Ocupacional en Chile visto desde la perspectiva de los estudiantes: ¿Cuál es la percepción de necesidades que tienen los estudiantes en relación a su proceso de formación? [Occupational Therapy undergraduate education in Chile seen from the students' perspective: What are students' perceptions of needs in relation their undergraduate education?]. In Palacios, M., Lagos, A., Morrison, R. & Zegers, B. (Eds.). *Cincuenta años de Terapia Ocupacional en Chile: Prácticas, epistemologías y realidades locales* (pp. 81-98). Chile: On Demand Publishing. ISBN 978-956-9311-01-07

Farias, L., Cifuentes, T., Guerra, V. & Rozas, S. (2012). *Consumo problemático de drogas y Terapia Ocupacional. Instrumentos de Evaluación e Intervención utilizados por Terapeutas Ocupacionales en el proceso de Rehabilitación* [Occupational Therapy and Problematic drug abuse. Assessments and Models of Interventions used by Occupational Therapists during the process of treatment and rehabilitation]. Germany: Editorial Académica Española. ISBN 978-3-659-01190-0

Media Publications

Nichols, B., & **Farias, L.** (2015). Notes from the field: Humanitarian discourses, systemic erasures, and the production of victimhood in "Child, Bride, Mother".

Retrieved from <http://www.youthcirculations.com/blog/2015/9/3/notes-from-the-field-humanitarian-discourses-systemic-erasures-and-the-production-of-victimhood-in-child-bride-mother>

Farias, L., Laliberte Rudman, D., & Magalhães, L. (2014). ISOS Stream discussion: Developing occupational science as a critical and socially responsive discipline: challenges and opportunities. International Society for Occupational Science, August 25-September 20. Retrieved from <http://isos.nfshost.com/news.php>

PRESENTATIONS

Invited Speaker/Panelist

Farias, L. (2017). Social transformation through occupation: Moving beyond intentions for enhancing justice? Preconference Occupational Science Europe and Think Tank on Occupation-based social transformation. HAWK University of Applied Sciences and Arts in Hildesheim, Germany, Sept. 7 (Invited Speaker)

Farias, L. (2016). Avoiding the blank stare: Great ideas for engaging students in tutorials across disciplines. Future Professor Workshop, Teaching Support Centre. Western University, Ontario, Canada, October, 17 (Guest panelist)

Farias, L. (2016). Successful international graduate students & their strategies. International Teaching Assistant Day. Teaching Support Centre. Western University, Ontario, Canada, Sept. 1 (Guest panelist)

Farias, L. (2016). Powerful images - The power and peril of photography and storytelling in a world with growing inequities. International Centre for Disability and Rehab (ICDR) University of Toronto, Ontario, Canada, June 28 (Guest panelist)

Farias, L. (2016). The graduate game plan: Strategies for success. Winter Conference on Teaching for Graduate Students. Teaching Support Centre. Western University, Ontario, Canada, January 30 (Guest panelist)

Farias, L. (2015). Professionalism: Networking at academic conferences. Future Professor series. Teaching Support Centre. Western University, Ontario, Canada, July 6 (Guest panelist)

Refereed Conference Presentations and Abstracts in Peer-Reviewed Conference Proceedings

Farias, L., & Laliberte Rudman, D. (2018). Enacting occupation-based social transformative work: Using a critical dialogical approach to apprehend challenges and opportunities. XVII International Congress of the World Federation of Occupational Therapists, May 21-25. Cape Town, South Africa (Abstract submitted for Oral presentation)

Gerlach, A., Aldrich, B., **Farias, L.**, Galvaan, R., Sellar, B., Laliberte Rudman, D., Magalhães, L., & Pollard, N. (2018). Critical practice in critical times: Forging relationships between critical theories and socially responsive occupational therapy. XVII International Congress of the World Federation of Occupational Therapists, May 21-25. Cape Town, South Africa (Abstract submitted for Workshop)

Farias, L., & Laliberte Rudman, D. (2017). Promoting critical dialogue to advance occupational science and therapy toward social transformative goals. 16th Annual Research Conference of the Society for the Study of Occupation: USA, Seattle, WA, Oct. 19-21 (Abstract accepted for Oral presentation)

Laliberte Rudman, D., **Farias, L.**, Galvaan, R., Aldrich, B., Gerlach, L., Magalhães, L., Pollard, N., & Sellar, B. (2017). Mobilizing critical theoretical perspectives to enact occupation-based social transformative work. 4th Occupational Science Europe Conference. Hildesheim, Germany, Sept. 8-9. (Abstract accepted for Panel)

Farias, L., & Laliberte Rudman, D. (2017). Critical dialogical approach and methods: Informing occupation-based social transformative work. 4th Occupational Science Europe Conference. Hildesheim, Germany, Sept. 8-9. (Abstract accepted for Oral presentation)

Ferreira, M. A., Rivas Quarneti, N., **Farias, L.** (2017). Exploration of the relationship between occupation and gender: A scoping review of occupation-based literature. 4th Occupational Science Europe Conference. Hildesheim, Germany, Sept. 8-9. (Abstract accepted for Oral presentation)

Veiga Seijo, S., **Farias, L.**, & Rivas-Quarneti, N. (2017). The impact of the economic crisis on the relationship between employment and health in Spain. 4th Occupational Science Europe Conference. Hildesheim, Germany, Sept. 8-9. (Abstract accepted for Oral presentation)

Magalhães, L., **Farias, L.**, Rivas-Quarneti, N., Alvarez, L., & Malfitano, A. P. (2017). The development of occupational science outside the Anglophone sphere: Challenges and opportunities for enacting global collaboration. 4th Occupational Science Europe Conference. Hildesheim, Germany, Sept. 8-9. (Abstract accepted for Panel)

Farias, L., & Laliberte Rudman, D. (2017). Enhancing critical reflexivity in occupation-based work through a dialogical approach. Canadian Association of Occupational Therapists Conference. Occupational Science Stream. Prince Edward Island, Canada, June 21-24. (Oral presentation)

Veiga Seijo, S., **Farias, L.**, & Rivas Quarneti, N. (2017). Precarious employment and its effects on health during the economic crisis in Spain: An occupational injustice issue? Occupational Therapy Students Conference. Brunel University London, UK, April 28 (Oral presentation)

Ferreira, M. A., Rivas Quarneti, N., **Farias, L.** (2017). Occupational therapy and gender: Exploring their historical relationship through scientific literature. Occupational Therapy Students Conference. Brunel University London, UK, April 28 (Oral presentation)

Veiga Seijo, S., **Farias, L.**, & Rivas Quarneti, N (2016). Aportes para la disciplina: Implicaciones del empleo precario para la salud en el contexto de la crisis económica en España [Contributions to the discipline: Implications of precarious work in health in the context of the economic crisis in Spain]. XI Occupational Therapy Conference in Castilla la Mancha, Spain, Nov. 5-6 (Oral presentation)

Farias, L., & Nichols, B., (2016). Problematizing constructions of motherhood, development discourses, transnational advocacy and indigeneity in Guatemala. Decolonizing Conference, Centre for integrative Anti-Racism studies, Ontario Institute for Studies in Education, University of Toronto, Canada, Nov. 3-5 (Oral presentation)

Magalhães, L., **Farias, L.**, Rivas-Quarneti, N., Alvarez, L., & Malfitano, A. P. (2016). The development of occupational science outside the Anglophone sphere: Enacting global collaboration. Joint International Conference in Occupational Science, Maine, USA, Sept. 28-Oct. 1 (Forum)

Farias, L., Benjamin, T. E., Janzen, R., & Laliberte Rudman, D. (2016). Problematizing the uptake of occupational justice from a critical occupational perspective. Joint International Conference in Occupational Science, Maine, USA, Sept. 28-Oct. 1 (Panel)

González Boquete, A., Rivas Quarneti, N., & **Farias, L.** (2016). Una revisión crítica de la evidencia científica de Terapia Ocupacional y drogodependencias: Reflexiones para una práctica comprometida [A critical review of Occupational Therapy evidence in the area of drug abuse: Reflections for an engaged practice] II Occupational Therapy Conference in Galicia, Spain, April 30 (Oral presentation)

Farias, L. (2016). Critically reflecting on epistemology to address health inequities in occupational therapy and occupational science. Moving forward together: Advancing Rehabilitation in a Global Context Conference. McGill University, Quebec, Canada, March 12 (Oral presentation)

Farias, L. (2016). From What to How and Why: Helping students to critically analyze texts. Presentation of Great Ideas for Teaching Winners. Winter Conference on Teaching for Graduate Students. Teaching Support Center. Western University, Ontario, Canada, January 30 (Oral presentation)

González Boquete, A., Rivas Quarneti, N., & **Farias, L.** (2015). Revisión de la evidencia científica de Terapia Ocupacional y drogodependencias: contexto, prioridades y miradas en la investigación [Review of Occupational Therapy evidence in the area of drug abuse: Context, priorities and research perspectives] II Occupational Therapy Conference in Madrid, Spain, November. 21-22 (Oral presentation)

Britton, T., **Farias, L.**, Nichols, B., Umana, K., Lavalley, R., & Hall-Clifford, R. (2015). Transnational Information Politics, Power, and the Child Migration 'Crisis': Guatemalan NGO Perspectives on Causes of Child Migration. 2nd NGOs and Non-profits Conference: NGOographies Conference, Interest Group of the American Anthropological Association, Colorado, USA, Nov. 17-18 (Oral Presentation)

Farias, L., Laliberte Rudman, D., Magalhães, L., & Gastaldo, D. (2015). Pushing beyond interpretation and understanding in Qualitative Health Research: Potential contributions of a transformative framework. XXI Qualitative Health Research Conference, Ontario, Canada, October 19-21 (Oral Presentation)

Farias, L., Laliberte Rudman, D., & Magalhães, L. (2015). Social action in occupational science: Pushing beyond interpretation and understanding. XIV Annual Research Conference of the SSO: USA, Florida, October 1-3 (Oral Presentation)

Farias, L., Rudman Laliberte, D., & Magalhães, L. (2015). Bridging research and social justice in occupational science: Potential contributions of a transformative framework. 3rd International Occupational Science Europe Conference 2015, Bournemouth, UK, Sept. 3-4 (Oral Presentation)

Farias, L. (2015). The Critical Interpretive Synthesis Approach: A tool for pushing beyond compiling and summarizing literature. Western Research Forum, Ontario, Canada, March 2 (Oral Presentation)

Farias, L., & Rudman Laliberte, D. (2014). A Critical Interpretive Review of how Critical Theory has been used in Occupational Science literature. Joint International Conference in Occupational Science, Minneapolis, USA, Oct. 16-18 (Oral Presentation)

Laliberte Rudman, D., Angell, A., **Farias, L.**, & Frank, G. (2014). Critical occupational science: Ethical, philosophical and political frameworks. Joint International Conference in Occupational Science, Minneapolis, USA, Oct. 16-18 (Panel)

Farias, L. (2014). Around the dinner table: How food-centered occupations enact possibilities for the mediation of cultural values, traditions and identities after forced family migration. XVI International Congress of the World Federation of Occupational Therapists, June 18-21. Yokohama, Japan, (Oral presentation)

Van Nes, F., Prodigier, B., **Farias, L.**, Jonsson, H., & Andresen, M. (2014). Meeting Occupational Therapy demands by using cultural diversity in the OT-Euromaster program. XVI International Congress of the World Federation of Occupational Therapists, June 18-21. Yokohama, Japan (Workshop)

López, C., & **Farias, L.** (2013). La formación de pregrado de Terapia Ocupacional en Chile visto desde la perspectiva de los estudiantes: ¿Cuál es la percepción de necesidades que tienen los estudiantes en relación a su proceso de formación? [Occupational Therapy undergraduate education in Chile seen from the students' perspective: What are students' perceptions of their needs in relation their undergraduate education?] I Chilean Congress of Occupational Therapy. Santiago, Chile, April 17-19 (Oral Presentation)

Farias, L. (2012). The process of negotiation of culture through everyday occupations among families with migrant background in Sweden. IX COTEC, Stockholm, Sweden, May 24-27 (Oral Presentation)

TEACHING EXPERIENCE

Instructor, Advance Teaching Program 2017 - present
Teaching Support Centre
Western University, Canada

Instructor, Teaching Assistant Training Program 2016 - present
Teaching Support Centre
Western University, Canada

Guest Lecturer 2014-present
Western University, Canada
Course HS 9730 Philosophical Foundations of Qualitative Research. School of Occupational Therapy. Session March 21, 2017. Course Coordinator: Dr. Elizabeth Anne Kinsella
Course OT 9571 Professionalism I, School of Occupational Therapy. Session November 16, 2015. Course Coordinator: Mary Beth Bezzina.
Course HS 9660a Occupational Science: Foundations, Perspectives & Research Issues, School of Occupational Therapy. Session November 9, 2015. Course Coordinator: Dr. Debbie Laliberte Rudman
Course RS 3125a Enabling Health and Well-being through occupation, School of Health Studies. Session November 2, 2015. Course Coordinator: Dr. Suzanne Huot
Course OT 9662 Global and Local Issues in Occupation, School of Occupational Therapy. Session June 8, 2015. Course Coordinator: Dr. Suzanne Huot.
Course OT 9662 Global and Local Issues in Occupation, School of Occupational Therapy. Session May 29, 2014. Course Coordinator: Dr. Lynn Shaw.

- Guest Lecturer** 2012
 Universidad Autónoma, Temuco, Chile
 Modules Qualitative Methods and Occupational Therapy and Introduction to Occupational Science and Occupational Therapy. School of Occupational Therapy. Session September 28, 2012. Course Coordinator: Cristian Lopez
- Co-Supervisor**, OT Student Research Project 2015-2016
 School of Occupational Therapy, Universidad of Coruña, Spain
Research Project: Occupational Therapy and Gender: Exploration of its historical relationships through scientific literature. *Received Academic award for its Gender perspective at the University of Coruña.*
 Student: Maria Alonso Ferreira
Research Project: The case of precarious work in Spain after the crisis: A case of occupational alienation. *Received Best Oral Presentation Award at the XI Occupational Therapy Conference in Castilla de la Mancha, Spain.*
 Student: Silvia Veiga Seijo
- Co-Supervisor**, OT Student Research Project 2014-2015
 School of Occupational Therapy, Universidad of Coruña, Spain
Research Project: Occupational therapy and drug addictions: A scoping study regarding the contexts, priorities and perspectives in research.
 Student: Lucía González Boquete
Research Project: People living in the streets, social exclusion and poverty: Enacting Social change in Occupational Therapy.
 Student: Mariana Fernández Lamas
- Co-Supervisor**, OT Student Fieldwork/Clinical Practice 2012-2013
 School of Occupational Therapy, Karolinska Institutet, Sweden
 Students: Erik H., Charlie Wester
- RESEARCH EXPERIENCE**
- Research Assistant** 2016-present
 Principal investigator: Dr. Jodi Hall
 Department: Western University, Fanshawe College
Research Project: Women's empowerment through collaborative learning in community (WeCLiC) - Funded by a College Social Innovation grant from Social Sciences and Humanities Research Council of Canada
- Research Assistant** 2016-2017
 Principal investigator: Dr. Carri Hand
 Department: School of Occupational Therapy, Western University
Research Project: Exploring methods to evaluate occupational therapy interventions in primary care: A focus on falls programming - Funded by Ontario Society of Occupational Therapists

Research Assistant 2014
 Principal investigator: Prof. Lynn Shaw
 Department: School of Occupational Therapy, Western University
Research Project: Understanding the experiences of students with disabilities in gaining pre-graduation work experience in the public sector - Funded by Employment and Social Development, Canada

PROFESSIONAL EXPERIENCE

Occupational Therapist, Full-time staff 2012-2013
 Karolinska University, Sweden
 Clientele: Acute inpatient neurology and neurosurgery departments, worked primarily with clients experiencing traumatic injuries, stroke and brain metastasis

Astrid Lindgren Children Hospital, Sweden
 Clientele: Neonatal Intensive Care Unit. Outpatient Child Hand unit.

Occupational Therapist, Full-time staff 2008
 Pedro Aguirre Cerda National Institute of Rehabilitation for Children, Chile
 Clientele: Inpatient Adolescent and Children.

Occupational Therapist, Part-time staff 2008
 Neurological Department, Clinic Hospital of Catholic University Chile, Chile
 Clientele: Outpatient neurology department, worked primarily with clients recovering from stroke

ACADEMIC SERVICE AND COMMITTEE WORK

Contributions as Peer Reviewer for Journal manuscripts

Annals of International Occupational Therapy	2017- present
Brazilian Journal of Occupational Therapy	2017- present
Teaching Innovation Projects Journal	2017- present
OTJR: Occupation, Participation and Health	2016- present
Journal of Occupational Science	2015- present
Chilean Journal of Occupational Therapy	2013- present

Contributions as Peer Reviewer for Conference abstracts

4 th OSE Conference 2017, Hildesheim, Germany	2017
17 th WFOT congress 2018, Cape Town, South Africa	2017
1 st COTEC-ENOTHE Conference 2016, NUI Galway, Ireland	2015
Health and Rehabilitation Sciences Graduate Research Conference 2015 & 2016, Western University, Canada	2014-2015
1 st Chilean Congress of Occupational Therapy and 7 th National Meeting of Occupational Therapy, 2013, Valparaiso, Chile	2012

Conference Planning and Leadership

Academic and planning committee member for the 2016 Health and Rehabilitation Sciences Graduate Research Conference, Western University, Ontario, Canada	2015-2016
Academic and planning committee member for the 2015 Health and Rehabilitation Sciences Graduate Research Conference, Western University, Ontario, Canada	2014-2015
Planning On-Site and Social/occupational Committee member for the 2014 International Conference SSO:USA & CSOS Minneapolis MN, USA	2013-2014
Planning committee member and group facilitator of the first event coordinated by the International Society for Occupational Science and the Division of Occupational Therapy at Karolinska Institutet, Sweden	2012

Scientific Society Leadership and/or Professional Society Membership

Society for the Study of Occupation: USA (SSO: USA)	2016-present
Graduate Student Issues Committee. Western University	2015-2016
Western's Caucus on Women's Issues. Western University	2015- 2016
Canadian Society of Occupational Scientists (CSOS)	2013- present
- 2015-2017 Member-at-large on the Board of Directors (elected). Student Relations Subcommittee	
- 2017 Organizer and peer reviewer for the CSOS Awards in Student Scholarship	
- 2016 Organizer and peer reviewer for the CSOS Awards in Student Scholarship	
Chilean Society of Occupational Science (SChCO)	2012-present
International Society for Occupational Science (ISOS)	2012-present
- Organizer and facilitator of the 4 th ISOS online discussion, August 25- September 20, 2014	
European Cooperation in Occupational Therapy Research and Occupational Science (ECOTROS)	2012-present

COMMUNITY SERVICE

Volunteer	2003-2005
TECHO (Chilean youth led non-profit organization that seeks to overcome poverty in slums).	
Volunteer in the community (Educational Programs)	
Volunteer, Summer and Winter Camps Coordinator (Construction Projects)	

SKILLS**Language Skills**

Spanish – Native or bilingual proficiency
 English – Professional proficiency
 Swedish – Professional proficiency