

Examining the Institutional Ethnographer's Toolkit

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Résumé

L'ethnographie institutionnelle est une méthode d'enquête prônée par la sociologue canadienne Dorothy E. Smith et par des chercheurs de nombreux domaines : sociologie, travail social, éducation, sciences infirmières, organisation politique, politique sociale, organismes de femmes, etc. Les ethnographes institutionnels ne s'inclinent pas devant des idées établies dans des écrits. Ils se fient plutôt à l'expérience des gens comme point de départ à une enquête sur les liens entre les cadres locaux de leur vie de tous les jours, les processus institutionnels et les relations de dominance translocales. Le concept de « dominance » de Smith s'inspire du marxisme. L'ethnographie institutionnelle s'appuie sur un mode d'exploration théorisé des pratiques dominantes – comme activités sociales des gens organisées par des écrits, par la langue et par l'expertise. Le présent article définit certains des concepts avec lesquels doivent se familiariser les personnes qui découvrent l'ethnographie institutionnelle, soit : l'épistémologie (et le virage épistémologique), l'ontologie (et le virage ontologique), l'organisation sociale, les relations sociales, les relations de dominance, le rôle des écrits dans les relations de dominance, l'idéologie, la problématique, le discours, l'expérience comme données, l'entrevue et la collecte de données.

Abstract

Institutional ethnography (IE) is a method of inquiry advocated by Canadian sociologist Dorothy E. Smith and a wide range of researchers working in sociology, social work, education, nursing, political organizing, social policy, women's organizations, and so on. Institutional ethnographers do not cede authority to ideas established in the literature. Instead, they rely on people's experience as the point of entry into inquiry exploring connections among local settings of people's everyday lives, institutional processes, and translocal ruling relations. Smith's concept of 'ruling' is derived from Marx. IE relies on a theorized way of exploring ruling practices—as people's social activities organized through texts, language and expertise. This article defines some of the concepts of which newcomers to institutional ethnography need to develop a working knowledge, namely: epistemology (and epistemological shift), ontology (and ontological shift), social organization, social relations, ruling relations, the role of texts in ruling relations, ideology, problematic, discourse, experience as data, interviewing, and data collection.

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Introduction

I started working for the federal public service in 1990. In 1997, I received a phone call from a man we shall call Bruno. Bruno had phoned to see if I was interested in becoming a member of the Advisory Committee for Persons with Disabilities (ACPwD), a committee which provided advice to senior managers in my Department on disability-related issues.

The ACPwD lobbied for the development and implementation of a comprehensive job accommodation policy for disabled employees in my Department. Members of this Committee toured all Canadian provinces delivering presentations to colleagues in my Department on the importance of accommodating the needs of disabled employees. After having raised awareness about the need for accommodation, I returned to my workplace and shortly thereafter submitted a request to my manager for workplace accommodation. Having spent considerable time and effort in developing and promoting our Department workplace accommodation policy, I thought that getting my accommodation would be simple and straightforward. Imagine my surprise when I learned that my request for accommodation had been denied. It was at that point that I decided to enrol in a doctorate research program in an effort to find a solution to this social problem.

Paulo Freire (1970) wrote that activism without reflection is problematic. Let me give you an example of how true this is. When the ACPwD developed its presentations on disability for its road show, we used what is commonly referred to in the literature as the medical model of disability (Gadacz, 1994). The medical model of disability locates the problem of disability in the individual. In our presentations we provided examples of various types of physical and mental disabilities people in the workplace might be afflicted with and how best to 'accommodate' those types of problems. According to Michael Oliver (1990), a Disability Studies² scholar in the UK, approaching disability in this manner is not what disability rights activists should be doing as it focuses people's attention away from the social and physical structures in society which oppress disabled people. In other words, upon reflection, the ACPwD should never have promoted what I shall momentarily define as the "ideological" way of knowing disability.

According to sociological theory, there are five major theoretical perspectives used to explain how Western societies operate: symbolic interactionism, phenomenology, structural-functionalism, feminism, and postmodernism (Henslin et al., 2004). The most prevalent of these five theoretical frameworks is structural-functionalism. The medical model is rooted in the structural-functionalist perspective. Auguste Comte, the founder of structural-functionalism, believed that society operated like a living organism and that things happen the way they do to maintain a sense of equilibrium (Henslin et al., 2004). For instance, it is only natural that disabled people fulfill the role of people who are in

2 "Disability Studies," as defined by Carol Thomas (1999: 8) in *Female Forms: Experiencing and Understanding Disability*, "is used to refer to those academics, writers and researchers who, in studying disability, explicitly align themselves with the social movement for the advancement of the social and political rights of disabled people."

need of being cured, as this is one of the reasons why we send our children to university to become medical doctors.

One of the first things I learned in my interdisciplinary doctorate program was that there is a different way of knowing disability – a different epistemology – than that of the medical model. In the early 1980s, Michael Oliver (1996: 30), coined the term “*social model of disability*”. This way of knowing disability locates the problem of disability not in the individual but in the manner in which our social and physical environments have been developed to only meet the needs of able-bodied people. Despite being a disability rights activist, I had not come across this other way of knowing disability. The basis for the social model of disability is Karl Marx's theoretical perspective, historical materialism (Oliver, 1990, Gleeson, 1997). Historical materialism is also the cornerstone of institutional ethnography (IE), the method of inquiry I chose for my doctoral research.

What IE researchers have retained from Marx's theory is this idea of keeping people's activities at the centre of all happenings in the everyday world. Investigations which use this method of inquiry begin with the following three assumptions. First, people are experts in how they live their own lives. Second, subjects are located in sites throughout society (local settings). And third, powerful outside (translocal) forces shape how people live and experience their everyday lives (Campbell, 1998). These translocal forces are what the founder of IE, Dorothy Smith, and other institutional ethnographers, call ruling relations, the purpose of which are to co-order and coordinate the activities and actions of people in and across various and multiple local settings (DeVault and McCoy, 2002).

IE enables people who are marginalized to understand the broader implications of their experiences in localized settings. This is accomplished by mapping those powerful forces operating from afar that hook the local into translocal relations of ruling, including those of the economy. The product of an institutional ethnography is a piece of social cartography that can be used both by those who are marginalized and by activists to better understand, challenge and transform powerful social forces (Campbell, 2000; Frampton et al., 2006; Smith, G., 1988; 1990).

As a newcomer to institutional ethnography I struggled with this method of investigation, as it requires a radical turn in thinking, which I will explain shortly. Using my own lived experiences as a disabled Canadian federal public servant and the published works of expert institutional ethnographers, I shall attempt to describe some of the important elements of the IE toolkit which I found most useful in understanding this method of inquiry from the perspective of a disability rights activist. The terms described include the following: epistemology (and epistemological shift), ontology (and ontological shift), social organization, social relations, ruling relations, the role of texts in ruling relations,

ideology, problematic, experience as data, interviewing, and data collection. They are meant for the un-initiated to do with what they can, and perhaps my use of IE as a disabled Canadian federal public servant will add to the understanding of seasoned institutional ethnographers.

Epistemology and Epistemological Shift

Chairs are a problem for me. Not commonly associated with the natural environment, they are a material object made by humans to serve specific needs we have in the social organization of work. This is what in IE is known as the experiential way of knowing, in this instance, about chairs. If people in the Canadian federal public service were not required to sit on chairs as part of our everyday work organization, I would not have a problem with this material object; hence, from my standpoint, the problem I have with chairs is more social than biological. Used in this context, the word "social" means "people's ongoing activities viewed under the aspect of their coordination with the activities of others" (Smith, 2005: 227). However, my employer and my medical doctor believe that the problem I have with chairs is biological; that is, it resides in me. This way of knowing about chairs, which does not reflect the embodied, experiential way of knowing, is what institutional ethnographers call the ideological or 'objective' way of knowing.

In writing that chairs are the problem, the political statement I am making is that chairs exist in the social and are not part of my identity: they are not my problem. They are a problem for my employer to resolve. Had I taken the institution's perspective instead and written that I have a problem with chairs because of my impairment, I would have inferred that the problem resides in my person, and that disability is, as has been described by some, a "personal property" issue (Thomas, 1999: 40-41).

Epistemology "is a way of understanding and explaining how we know what we know" (Crotty, 1998: 3). When institutional ethnographers map out translocal social relations to figure out how they impact on people's daily doings in their local environments, the spot on the map which says YOU ARE HERE! illustrates the location of what institutional ethnographers refer to as a line of fault between two contradictory ways of knowing something: knowing experientially versus knowing objectively or ideologically (Campbell and Gregor, 2002). Using IE as the method of investigation for my doctoral research enabled me to make this important discovery and to see the disjuncture between these two different ways of knowing. In recognizing that the problem of disability is located in society, instead of in me, I made what institutional ethnographers refer to as an epistemological shift. According to Frampton et al. (2006), this radical turn in thinking is one of two keys to understanding IE.

Ontology and Ontological Shift

The other key is ontology. "Ontology", writes Crotty (1998: 10), "is concerned with what is, with the nature of existence, with the structure of reality as such." The following vignettes illustrate what institutional ethnographers mean by ontology and ontological shift.

I have been told that negative attitudes are more disabling than disabled people's impairments and that if these negative attitudes could be changed, it would go a long way towards solving a societal problem experienced by disabled people. Public Works and Government Services Canada published a book edited by Janet Smith, a former senior officer in the federal public service, titled *Chapter 1*, describing how a government task force had been assigned the task of "creating a new culture in the Public Service" (Canada, 2000: x). Corporate culture was defined as "how things are around here"—how people react to one another in the hallways and corridors, what people discuss around the water cooler, the type of apparel people wear, and so on (Canada, 2000: x). The thesis of Janet Smith's book is that changing the corporate culture would lead to a more inclusive workplace. Attitudes were considered to be a major component of corporate culture.

Many in the gay and lesbian community also believed that negative attitudes—"discriminative animus"—on the part of police officers was what led to an unprecedented number of arrests made in February 1981 when police raided gay bathhouses in Toronto (Smith, G., 1990: 633). Speculating that "discriminative animus" was the reason that gay bathhouses were raided by police, and theorizing that "attitudinal barriers"³ are at the root of the problems experienced by disabled workers in the federal public service are two examples of speculation concerning why marginalized persons experience their problems. In instances like these two speculative accounts, agency⁴ is transferred from people to concepts. This hooks us into the ideological way of knowing something. Writes Dorothy Smith (1990: 37), "these terms [discriminative animus and attitudinal barriers] express social relations organizing the actual activities of people, but the social relations themselves are presupposed without being explored or analyzed."

Making an ontological shift means transferring agency away from concepts like discriminative animus and attitudinal barriers back to the embodied knower so that we come to understand how things happen the way they do. This, as I explained in the previous section, draws us into the experiential way of knowing something. Prior to learning about IE, I was focused on trying to remove attitudinal barriers against disabled workers. I was convinced that this was why disabled workers were victims of oppression in our workplaces. After shifting my focus from wanting to know why to wanting to know how, I felt more empowered because from my standpoint as a disability rights activist, understanding how something works seemed to be a pre-requisite to knowing how to

3 Interdepartmental Forum of Persons with Disabilities (2002: online).

4 Frampton et al. (2006: 27) define agency as "people's collective capacities to act in coordinated ways to either reinforce or to dismantle existing social relations".

change it. This shift in approach from trying to explain *why things happen the way they do* to *how things happen the way they do* is what institutional ethnographers strive for in their research. We do this by focusing on 'social relations' and on keeping people's actions at the centre of happenings in the everyday world.

Social Organization and Social Relations

The method of IE was founded on the assumption that humans are social beings and that our everyday/everynight⁵ lives are "socially organized." "Social relations" are social processes that people enter into during their daily/nightly lives (Travers, 1996: 543); this is a technical term derived from Karl Marx, not to be confused with the social relationships between husband and wife, a parent and a child, or a university professor and her or his student (Campbell and Gregor, 2002: 31). Campbell and Gregor (2002: 27) write that it is "the interplay of social relations, of people's ordinary activities being concerted and coordinated purposefully, that constitutes "social organization". Dorothy Smith (2005) contends that in contemporary society the social organization of our daily lives cannot be wholly understood from simply looking at the local setting in which we live our lives; we need to go beyond that. The following comparison of the manner in which people used to acquire meat for the table centuries ago with how it is usually done today illustrates the term social relations.

In her book, *The Everyday World as Problematic*, Dorothy Smith refers to an ethnographic movie called *The Hunters* which describes how a giraffe was stalked and killed by a small group of Kalahari Bushmen (Smith, 1987). After the giraffe was killed, the hunters brought the meat back to camp for distribution. The movie portrays an old man distributing the meat to small family groupings. Each of these groups then takes their share and distributes it to other waiting kinfolk. All members of the tribe are involved and form part of the distribution process. The social relations in which people enter in tracking the giraffe in a given territory; the killing of the animal by the hunters; the distribution of the meat: the entire process that the meat takes from when the animal is tracked down, slaughtered in the bush and then transferred to cooking pot to belly is observable in that local setting.

If we were to contrast that experience with how things work in contemporary industrial society where some people purchase meat for the kitchen table from their local supermarket, it becomes apparent that the process of identifying how the meat gets to the store shelves is predominantly a mystery and for the most part remains invisible. The only thing observable is the material exchange which takes place between the buyer and the seller. Arising from human activity, the exchange process is a social relation between two practices—buying and selling. It is these types of relations that people enter into which connects them with others that are referred to as social relations. The social relations that

5 Smith defines the everyday/everynight world as "that world we experience directly. It is the world in which we are located physically and socially. . .It is necessarily local—because that is how we must be—and necessarily historical" (Smith, 1987: 90).

are made invisible, in this instance, by the economic exchange are what the institutional ethnographer would seek to explicate⁶.

After first establishing what consumers actually do when they purchase their meat, the task of the institutional ethnographer would then be to explicate the translocal social relations implicated in the acquisition of this meat by the local supermarket. This could conceivably entail such things as explicating a farmer's husbandry practices as stipulated by the state and which s/he may have learned at college or university; how feed producers are accountable for obtaining and utilizing the proper amounts and ratios of ingredients for the manufacturing of feed for livestock destined for human consumption; how the abattoir owner and her/his employees are involved in adhering to state guidelines surrounding the slaughtering, dismembering, and refrigerating of the animal carcass; and how the trucker is obligated under state regulations to ensure the safe transportation of the meat products to retailers. The purchase of meat from the supermarket, an ordinary daily activity undertaken by countless people in multiple settings, has an "implicit local organization tying each particular local setting to a larger generalized complex of social relations" (Smith, 1987: 156). These social relations are not immediately observable in the local setting and are enacted by people who are not necessarily known to each other and "often without their conscious knowledge" (Campbell and Gregor, 2002: 31).

Ruling Relations

Smith (1990) points out that many of the concepts identified in contemporary sociological studies such as mental illness, poverty, unemployment, and disability, to name but a few, have been constructed by an apparatus which consists of a variety of bureaucratic, legal and professional organizations. These concepts are used to rule people.

Smith's concept of ruling stems from Marx's analyses of class oppression in the nineteenth century (Campbell and Gregor, 2002: 39). Modern ruling practices, however, operate quite differently than those of Marx's day. In the twenty-first century, texts and text-mediated practices are central elements of the ruling apparatus and of how power is socially organized. The following example illustrates Smith's concept of 'ruling relations' in contemporary society.

Approximately two years after I started my doctoral program, on August 8th, 2004, my mother passed away unexpectedly while I was home visiting my parents with my 12-year-old son. During those intense early hours of that historic Sunday morning, my father, son, and I were distraught over this lived experience, none of which was captured in a statement which the police obtained from me while I was sitting on the sofa in my parents' kitchen at 3:30 a.m. After verbally explaining the circumstances which had led to my finding my mother presumably dead on her bed, I was asked to provide a chronological narrative of

6 'Explicate' refers to an exploration of the actual social relations involved in the enactment of a particular social organization like grocery shopping (Smith, 1987: 175).

those events—not once but twice. The fact that I needed to do this twice, consecutively, and that during the second narrative the police officer meticulously wrote down every word I used to describe what had happened; the fact that I had to sign this statement after it was read back to me orally by the police officer: all of this struck me as being totally at odds and out of sync with what we as a family had just experienced.

This is because the narrative provided to the police contained nothing about the lived experience which my father, my youngest son and I had been through during the wee hours of that early morning. Made to contain mundane facts about my mother's prior medical history, her recent visits to her physicians, the fact that she had not been well after supper the evening before and how my father had come upstairs to awaken me at 1:50 a.m., this official process of constructing a death bore none of our embodied experience during those gruesome early hours of that day.

My mother's passing was dealt with in an abstract manner. There was no place in the police report for the true and accurate recollection of my lived experience: the misgivings I felt about having to duplicate my story for the police simply to acquit all those who were present in the house at the time of my mother's death; the feelings of disgust I experienced when the paramedics dragged my mother off the end of the bed and onto the floor, like a dead horse being tractor-pulled off a knoll; the panic I felt when I saw my 12-year-old son come downstairs to witness the tragic events of that dark, early morning; the devastation experienced when the paramedic kneeling down before my dad said that they had done everything they could to revive my mom. These experiences were discarded, not relevant to the official process of registering a death. The emotions surrounding the death of our loved one had no bearing upon the legal and medical construction of what was to the police officers a mere death.⁷ This experience of 'motherloss' happens to most of us, and deserves to be responded to by other human beings in the same manner and at the same level as where we are located.

A death occurring in the family home; however, is subsumed by the relations of ruling which are more focused on establishing whether the death was from natural causes or was a homicide, hence the need to obtain official statements from family members which could then be used as 'evidence' in a court of law, should the need arise. Institutional ethnographers see processes such as the police producing their report as work processes involved in constructing an ideological account. As Marie Campbell (2001: 243) explains: "When an account is constructed, inserting a ruling conceptual frame and suppressing the experience of the 'subject' of the lived actuality that the account claims to be about, the account is said to be ideological."

7 cf. Smith (1990: 86-88).

Role of Texts in Ruling Relations

In today's knowledge-economy, text-based forms of knowledge and discursive organization play a central role in shaping people's everyday/everynight lives (Bell and Campbell, 2003; DeVault and McCoy, 2002; Smith, D., 1990). Texts refer to documents or some sort of representation that has a "relatively fixed and replicable character" (DeVault and McCoy, 2002: 765). Dorothy Smith uses the metaphor of DNA as a means of illustrating how socially organized knowledge invented in one location becomes packaged in texts and then replicated either electronically or in hard-copy format in multiple locations as a means of regulating local activities and organizing the social relations among people (Jung, 2000; Smith, 1999). Texts, as Dorothy Smith explains, are "speakers in a conversation" that readers enter into when they engage with these texts (Bell and Campbell, 2003: 117). These "textual conversations," write Bell and Campbell (2003: 117), "standardize the almost limitlessly various understandings of readers; that is, they bring a similar understanding of what is read about to all those professionals who read the same text." Texts come in a variety of configurations ranging from printed documents like standardized government forms, reports, drawings, photographs, virtual replications of the aforementioned on computers, videos and sound recordings (DeVault and McCoy, 2002). Examples of texts include such things as the card we use for signing out books and other reference materials from the library, the camping permit we are required to purchase in order to stay overnight at Mount Carleton Provincial Park, and the workplace accommodation request form that a disabled worker in the federal public service may need to complete when she or he makes a request for accommodation. Since I had once been such a disabled worker, I found the IE notion of texts quite compelling when I was first introduced to this method of inquiry.

People routinely use texts in the conduct of their work. I will now describe how institutional texts were used to render a harmless act into what the Criminal Code of Canada defined as being a crime.

George Smith (1988: 177) wanted to know how it was that police had invaded gay steam baths in Toronto in February 1981, arresting more than 300 people. The gay community came up with all sorts of speculation as to why such a massive number of gay men had been arrested. Having made the ontological shift, Smith was not so much interested in knowing why as opposed to knowing how. Starting at the disjuncture where gay men's pleasurable sexual encounters were transmogrified into criminal acts, he used textual analysis to discover how 'it' happened. Textual analysis in this sense does not mean finding an appropriate text which correctly interprets how things are supposed to happen and which the researcher may or may not cite in her/his analysis. In institutional ethnography, "Textual analysis...uncovers the ideological practices that produce a certain kind of knowledge practical to the task of ruling" (Sharma, 2001: 421).

George Smith (1988) found that under Canadian law all sexual activity performed beyond the limits of procreation done in “familial settings” is defined as “indecent acts”. It follows then that anyone engaged in sexual activity in a public setting can be charged with an indictable offense. Two sections of the Criminal Code of Canada reflect this. Section 197 defines a “common bawdy house” as a place where people meet “for the purpose of prostitution or the practice of acts of indecency”. For my purposes, I shall limit this discussion to the latter—“acts of indecency”. According to Section 210 of the Code, anyone found in such an establishment either as a patron or as an owner “is guilty of an offence punishable on summary conviction” (Smith, G., 1988: 177).

What I have just described in the above paragraph is what I referred to earlier as the ‘objective way’ of knowing something. It differs, as is always the case, from the ‘experiential way’ of knowing it. The gay men who met in these bathhouses did not see themselves as criminals. They saw themselves as engaging in pleasurable sexual activities. So, how was it that these gay men became convicted criminals?

In a democratic society such as ours, the state mandates its police with the task of ensuring that its citizens follow the rule of law. Far too elaborate for any person to retain on her or his own, these rules appear in the form of texts which are then made accessible to the police operating in any jurisdiction across the country. When Constables Coulis and Proctor infiltrated the steam bathhouse known as the Back Door under false pretenses, they were not pre-occupied with any of the reasons the patrons may have had about being there. The police went there to gather evidence which could be used in a court of law to have these gay men arrested, charged, and convicted. As a result, the report which the police produced contained nothing which reflected the standpoint of the gay men. Instead, the report contained facts which reflected the ‘regulatory frame’ outlined in the Criminal Code.

Writes Dorothy Smith (2005: 194), “the disjuncture between the experienced actualities of those caught up in such a process and what is recognized in the form of words that represent them institutionally is an important dimension of *institutional power* (my emphasis)”. In other words, this example illustrates how texts wield enormous power in contemporary society when activated by members of the ruling apparatus, such as the police, officers of the court, and so on.

Ideology

Dorothy Smith makes use of Marx’s and Engels’ (1939) concept of ideology as defined in *The German Ideology*. Ideology does not in this instance refer to political beliefs, but refers to “those ideas and images through which the class that rules the society by virtue of its domination of the means of production, orders, organizes, and sanctions the social

relations that sustain its domination” (Smith, 1987: 55). What this means is that people in society see things through a lens which presents reality in a way which suits the needs of those who are in power; that is, those who control “the means of mental production, so that thereby, generally speaking, the ideas of those who lack the means of mental production are subject to it” (Marx and Engels, 1939: 39).

According to my interpretation of Dorothy Smith’s “recipe for making ideology” (Smith, 1990: 44), this involves two main steps. In the bathhouse vignette described above, the gay men had gathered in the bathhouses to have sex. The first step, Step # 1, of the applicable ideology recipe (see Figure 1 below) involved generating an abstraction from an established ‘fact’. The Criminal Code contains facts on ‘crime’, ‘bawdy-house’, ‘indecent acts’, and so on. Masturbating in public is an abstraction of what is defined in the Code as indecent acts. This is illustrated by the top arrow in Figure 1. Now banish the notion that these people were there for their sexual enjoyment and, for a moment, strike out the subjects as well. What do you suppose you have left? As far as the police were concerned, all that you had left was the masturbating in public. Through nominalization⁸, masturbating in public becomes what Dorothy Smith calls an “abstract noun capable of functioning as an agent” (1990: 44). We already know that masturbating in public is illegal (Smith, G., 1988). After having removed the subjects from the picture and stripping them from all the connectives to the real reasons they were present in the bathhouses, the next step for making ideology involves bringing people back into the picture and sticking onto them this business of masturbating in public. This, Step # 2 of Figure 1 below, is mediated through texts and is depicted by the bottom arrow which is meant to illustrate how an abstraction is made to be an expression of the fact. It is at this point that the process is reversed: the abstraction (masturbating in public) which was created from the fact is now turned on its head and becomes the basis upon which the Code is interpreted in this concrete instance. “Each is used to elaborate the other,” writes George Smith (1988: 173). What we have here is what institutional ethnographers call an ideological circle.

It is the discovery of these ideological circles that enables institutional ethnographers to explicate how things work for those who are marginalized by the ideological process. In the analysis of the police raid of the bathhouse, I demonstrated how the transformation of a pleasurable experience into a criminal act was achieved through the use of texts. From an activists’ standpoint, the important point to remember is that once the ideological connections become clear, the ideological process can be infiltrated and transformed by those who are marginalized and oppressed by it (Campbell, 2000).

8 ‘Nominalization’ means that a verb is made to function as a noun. In so doing, it suppresses the presence of a subject. “Things are getting done, but no one is present to do them”, writes Dorothy Smith (2005: 111).

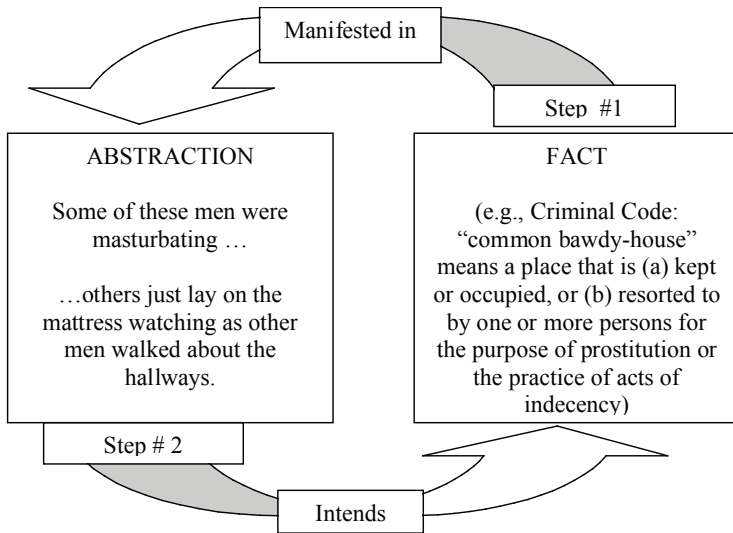


Figure 1. The making of an authoritative account by police of gay men masturbating in a steam bathhouse in Toronto.⁹

My main objective for this section was to show that ideology is a method (Smith, D., 1990: 45) used by the ruling apparatus to drive a knowledge wedge between the experiential and the ideological. Whatever happened in the bathhouse happened; how it became known differed between those who were bathhouse 'clients' and the police who were there for official purposes and whose work went into the official accounts that were made after the raid. The experiential in the example I chose was that gay men had gathered in bathhouses to have sex. Yet, through the use of a textually-mediated ideological process, the lived reality of people was 'culled' and in its place was enacted a "version of the world that is peculiarly one-sided, that is *known only from within the modes of ruling* (my emphasis) and that defines the object of its power" (Smith, 1990: 83-84).

Problematic

A problematic in IE is neither a problem that an informant or a member of an activist group might explain nor a research question. A problematic "sets out a project of research" (Smith, 2005: 227) which focuses on discovering how people's everyday experiences are hooked into and coordinated by relations of ruling. The problematic may be something which you are living and experiencing or it may be something which others are going through and about which you have heard. To learn about a problematic, the institutional ethnographer needs to take the standpoint of the person(s) with whom she or he chooses to work (Campbell and Gregor, 2002). In taking the side of potential informants and in becoming an actor on the scene, the researcher is able to investigate the translocal ruling

⁹ The Criminal Code quote included under 'Fact' is cited as follows: Smith, G. (1988: 174).

relations which affect the local experiences of those whose side the researcher is on, so that the information obtained can be of benefit to those who are being oppressed by the ruling relations. The following example illustrates a problematic.

According to its written policies, my university—the University of New Brunswick (UNB)—is required to provide reasonable accommodation, within its limited resources, to meet the needs of students with disabilities. Every summer, UNB offers a 5-week English Language Program (ELP) for people wanting to learn English. Yvan Tessier, a blind student from Québec, was interested in taking this course. After he had registered for the program, he discovered that he would have to sign a pledge sheet agreeing to only speak English to his seeing-eye dog, Pavot. This constituted a problem for Yvan because Pavot had been trained to respond to French commands and would not understand commands uttered to him in English.¹⁰ In this instance, an institutional ethnographer would identify the problematic as occurring at the point of rupture between the stated intentions of the university's all-inclusive policy—a text-mediated “generalizing and abstracted form of social relations” (Smith, 1987: 157)—and Yvan's and Pavot's actual experience of the ELP administrators not accommodating Yvan's need to utter French commands to his seeing-eye dog, Pavot. I had the opportunity to meet Yvan and help him gain access to the UNB campus. In addition to providing him with assistance, as a researcher I wanted to understand the process of his exclusion from participation in the ELP, given that Canadian universities are under a legal obligation to accommodate the needs of all types of students, including the blind. My involvement with Yvan had a significant impact on my understanding of IE.

Experience as Data

A typical problematic starts with an exploration of how the actualities of everyday lived experiences are “hooked into, shaped by, and constituent of the institutional relations under exploration” (DeVault and McCoy, 2002: 753). The institutional ethnographer typically starts her/his exploration from the standpoint of the individuals whose experience provides the starting place for the problematic under investigation (DeVault and McCoy, 2002). Marie Campbell started from the experience of people with physical disabilities wanting to live independently (Campbell, 2000; Campbell, Copeland, and Tate, 1998). Jung (2003) started from the experience of university students with disabilities seeking accommodation, while Travers (1996) started with the experience of socially/economically disadvantaged women and their families. Diamond (1992) started with the experience of residents and nurses in nursing homes, Harrison (2002) started with the experience of abused wives of Canadian military members, and the problematic of my doctoral dissertation was the experience of disabled employees in the federal public service seeking workplace accommodation.

10 For information relating to this incident, see Buncombe (2004), Peritz (2004) and Reynolds (2004).

The sequence followed in researching a problematic is to: “1) identify an experience, 2) identify some of the institutional processes [social relations] that are shaping that experience, and 3) investigate those processes in order to describe analytically how they operate as the grounds of the experience” (DeVault and McCoy, 2002: 755).

Joan Scott argues that one cannot use experience as the basis for knowledge, that “it is not individuals who have experience but subjects who are constituted through experience” (Scott, 1991: 779). Scott therefore adopts the postmodern stance that discourse shapes people's experiences to the extent that the discourse which is present during a particular historical period or social situation is what people will assert through dialogue with the ethnographer. In other words, there is nothing ‘real’ about human experience; we only have the pseudo-realities constituted by discourses. Dorothy Smith (2005: 24) agrees with Scott's stance that “the experiential can't be directly translated into the factual” but argues that experience is a valid starting point to discovering how discourse shapes that experience. The IE stance on experience is that it is real and anchored in material conditions. As Campbell (1998: 47) writes: “The analysis begins in experience and returns to it, having explicated how the experience came to happen as it did.” In other words, experience is a ‘door’ through which the ethnographer goes to explicate the institutional processes that shape that experience - for instance, the organization of home-care services for people with disabilities, the administration of a university's accommodation policy for students with disabilities, the social organization of nutritional inequities, the administration of nursing homes, the response of the Canadian military organization to spouse abuse in its members' homes, or the organization of workplace accommodation for disabled workers in the Canadian federal public service.

Interviewing

Interviewing is an important element of institutional ethnographic research, and has been described as “talking with people” (DeVault and McCoy, 2002: 756). Interviews may be done one-on-one or in focus groups. From my experience with institutional ethnographic interviewing, informants quickly come to the realization that they are experts in their lives. As such, they usually have little difficulty in providing the researcher with the desired information. There are no standard set of questions used for IE interviews. Questions are based partly on what was learned from previous interviews and partly on the researcher's accrued knowledge of the social relations constituting the problematic under investigation. Dorothy Smith explains it this way: “You have a sense of what you're after, although you sometimes don't know what you're after until you hear people telling you things...Discovering what you don't know—and don't know you don't know—is an important aspect of the process” (cited in DeVault and McCoy, 2002: 757).

When carrying out my dissertation research, I found the interview process to be intellectually and emotionally taxing, as I had to constantly evaluate my understanding of the “coordination of activity in multiple sites” being described by the informant (Campbell and Gregor, 2002: 77). Eric Mykhalovskiy describes the process as being analytical because it involves more than simply asking questions and listening to the answers provided. As he indicated: “Describing interviews as a set of questions doesn’t get at the actual work involved. For me, analytic thinking begins in the interview. It’s like an analytical rehearsal. I’m checking my understanding as it develops; I offer it up to the informant for confirmation or correction” (cited in DeVault and McCoy, 2002: 757). To preserve details of the activities being described by the informants, IE researchers frequently tape conversations. Transcripts of the tapes are made; this not only facilitates analyses of the data but also gives a voice to the informants in published accounts of the research. Moreover, using the actual words of the informant is important due to IE’s analytic attention to language and how ruling relations work in a particular setting (Smith, 2005).

Data Collection

Data collection techniques used in IE vary and may include such things as participant observation, a researcher’s reflection on her/his own experiences, focus groups and interviews (DeVault and McCoy, 2002). According to Campbell and Gregor (2002: 60), there are two types of data in IE. First, there are entry-level data. Entry-level data come from the interactions and activities of subjects in the local setting; that is, the subjects whose experience is the keynote component of the problematic under investigation. The narratives of the informants interviewed during the collection of entry-level data provide the clues to who is approached and interviewed in the collection of level-two data; that is, with those who are “positioned outside the setting.” The purpose of collecting level-two data is thus to understand the nature of the connections between people at this level and the informants interviewed at the first level, as a contribution toward explicating the relations of ruling.

When settings are organized through text-mediated ruling relations, it is necessary for the researcher to investigate how texts coordinate informants’ experiences. Janet Rankin (2003) used a survey on the quality of service delivered to her Aunt Hannah after she was hospitalized for 10 days. Bell and Campbell (2003) used healthcare records to discover ‘what happened’ to a 10-year old child with Rett syndrome who presumably died from severe malnutrition. And as we saw previously, George Smith (1988, 1990) used elements of the Criminal Code of Canada and a report produced by the police in establishing how so many gay men who frequented bathhouses in Toronto during the early 1980s were arrested.

Conclusion

In this article, I have provided, as I understand it, an introduction to the conceptual framework underpinning the method of investigating the relations of ruling known as institutional ethnography. This introduction was meant for newcomers to quickly gain an appreciation for what this method of inquiry entails and how it might be applied to one's scholarly and/or activist interests.

One of the salient features of this method is that while an activist/researcher is apt to begin from the standpoint of those who are oppressed, eventually s/he must shift to an investigation of the translocal ruling relations that hook into and coordinate the experiences that the 'subjects' or 'informants' are unable to explain from their positions in a local setting. IE makes the conceptual divide that conventional sociologists have created between "the macro" and "the micro" disappear (Smith, 2005: 36). In addition, IE is emancipatory, in that it is accountable not to the relations of ruling, as is so often the case with traditional scholarship, but to those people who are being oppressed (DeVault and McCoy, 2002). The following illustrates how I discovered this to be true.

The problematic for my dissertation research was to explicate how workplace accommodation works in the Canadian federal public service (Deveau, 2008). Early on I was discouraged from doing this research, firstly, because activists in my entourage believed that this type of research should be done by a private consultant and that I should act as the project's overseer. Secondly, many fellow disability rights activists seemed to prefer to give agency to concepts such as attitudinal barriers and managerial incompetence. These concepts became the causes that explained why disabled workers laid complaints against their employer. But as George Smith (1990: 634) argues: "These kinds of explanations preclude understanding how (my emphasis) things actually work." The concepts of attitudinal barriers and managerial incompetence do not explain how disabled workers came to be treated unjustly and how, despite the workers' complaints and activists' work, the issue was not being resolved. Whereas historically the federal public service has attempted to solve the problem of workplace accommodation by focusing on corporate culture change and mandatory diversity training, it has failed to understand what my institutional ethnographic research has discovered, that disabled workers will not be accommodated in the workplace until radical changes have been made in the definition of persons with disabilities used in the Employment Equity Act and in other government texts. Anchored in a materialist mode, IE has as its objective the unravelling of how things happen the way they do. By using IE in my research, disability rights activists and our allies in the Government of Canada now have an empirical map of institutional processes that need to be reconfigured to meet the needs of all types of workers.

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