Practicing Reflexivity: Balancing Multiple Positionalities During Fieldwork

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Abstract

This case study presents the lessons learned from conducting data collection in the field for a doctoral dissertation project. The practice of reflexivity, and its importance in identifying positionalities, and recognizing how they shift over the course of the research process are examined. The needs of each positionality may not always be compatible with one another, which can lead to challenges in the field for the researcher. This case examines the different ways in which positionalities can oppose one another, and the strategies researchers can use to manage these positionalities. The lessons learned are articulated as seven steps to practicing reflexivity, which will enable researchers to manage multiple and diverging positionalities while conducting qualitative research in the field.

Learning Outcomes

By the end of this case, students should be able to

- Understand the importance of reflexivity to qualitative research methods
- Map out their positionalities and social locations
- Maintain a reflexivity journal during fieldwork

Project Overview and Context

Conducting research with human beings is one of the most rewarding and most challenging aspects of doing qualitative research. While it can be richly fulfilling to be able to get access to information about individuals directly from them—whether through observations, interviews, or focus groups, for example—it can also be difficult to discern whether the data we collect accurately depict their lived realities. This is largely because people are complex, and multi-faceted, and they contradict themselves regularly in terms of their actions and their words—not because they have a desire to be untruthful, but because they are made up of so many different positionalities (e.g., Alcoff, 1988).

Positionalities refer to the concept that people are made up of a myriad of different characteristics (e.g., sister, student, mother, shopaholic, vegetarian), and these various social locations impact how we experience the world. For instance, while the vegetarian may be opposed to consuming meat products, the shopaholic may find herself coveting a new designer leather jacket, which the sociology student may balk at purchasing because of the use of child labor practices by the designer. As a result, if the individual was asked in an interview whether they purchase designer clothes, their response will often be complicated based on which positionality is at the forefront at the time the question is being asked.

Within qualitative research methods it has become common practice for the researcher to actively consider
the different positionalities of their participants and how this may impact the research project. Researchers are trained to consider the complexities of their participants. As such, when participants are seen to be contradicting themselves, the researcher can consider the factors that may lead to the contradiction, and how their participants’ multiple positionalities may be impacting their responses.

Just as participants are made up of positionalities that may not always be congruent with one another, researchers too are made up of different social locations that impact their ability to complete their research projects (Berger, 2015; Nencel, 2014). As such, it is imperative that the researcher is being reflexive throughout the research process. Reflexivity refers to the practice of being mindful of the many ways in which we impact our research, and the ways in which the research impacts us (Gair, 2012; Medved & Turner, 2011). Qualitative researchers are increasingly engaging in reflexivity, as they recognize that the research process is significantly impacted by the researcher conducting the project—from the type of question they choose to ask (or not), to the ways in which they choose to disseminate their results.

Reflexivity as a practice can focus on various elements, such as the constant monitoring of the ethical concerns that arise during the research process (Day, 2012; Sultana, 2007), and being vigilant about individual vulnerabilities, fears, and biases (Bott, 2010; Burkitt, 2012). There is no one way to practice reflexivity, as researchers may choose to focus on different dimensions based on disciplinary or epistemological expectations. However, to truly be reflexive, researchers must first learn how to recognize their positionalities and the influence of these positionalities. In this article, I will outline the lessons I learned about managing multiple positionalities when conducting fieldwork for the first time during my doctoral dissertation.

Practical Lessons Learned

During the summer of 2011, I had the opportunity to travel to Sri Lanka to complete 66 semi-structured interviews as a part of a larger dissertation project. Although I was born in Sri Lanka, I had left when I was 3 years of age, and this would be my first time returning to what was my country of birth. The multi-decade long ethnic conflict had ended in Sri Lanka in 2009 with the defeat of the Liberation Tigers of Tamil Eelam (LTTE or Tamil Tigers), and I wanted to speak to Sri Lankan Tamils who were born during the conflict to determine how they were conceptualizing their Tamil identities with the end of conflict, as well as how they understood their relationships with the global Tamil diaspora. I conducted interviews in three regions of Sri Lanka, selecting these sites because they are the most heavily populated by the Tamil population: Jaffna, Batticaloa, and Colombo. All participants were between the ages of 18 and 30 to mirror the ages of the second-generation Sri Lankan Tamil members of the Canadian diaspora that I interviewed in Toronto.

This was my first foray into doing qualitative research in the field, and there were several lessons I learned about being reflexive, and how to restructure future fieldwork. In this case, I will outline seven general steps that I recommend following to help researchers be reflexive of their positionalities during fieldwork. I will list them here, and then discuss them with reference to my own fieldwork experiences. They are lessons I learned
the hard way (mainly through my own dissertation experiences) and have now become steps that I implement in my other research projects. The steps are as follows:

1. Create a reflexivity journal
2. Outline positionalities prior to beginning fieldwork.
3. Understand the motivations and oppositions of each positionality.
4. Plan for these motivations/oppositions.
5. Stick to the plan.
6. Maintain and update reflexivity journal, irrespective of which positionality is leading.
7. Be gentle with yourself when the plan fails

Step 1: Create a Reflexivity Journal

Reflexivity is a process; therefore, it is important as a researcher to constantly keep track of how our own identities, feelings, and attitudes may be impacting the field. Therefore, my suggestion always is to keep a reflexivity journal. Qualitative researchers are often trained to keep a journal of their fieldwork experience, where they keep track of the work that they did and any extenuating circumstances (e.g., a participant becomes angry), but it is also important to keep a simultaneous log of ourselves during this process, and how we change and impact our work (Ortlipp, 2008). Therefore, I encourage the creation of the reflexivity journal. While much of the literature on journal writing for qualitative research is focused on being reflexive of how we as researchers may have impacted the data, I propose keeping a journal that is explicitly focusing on our changing positionalities, and intentionally addressing how these positionalities influence the data and the fieldwork experience. As such, in this journal, you will keep track of your fieldwork experience, while also monitoring yourself. The entries should occur simultaneously, further demonstrating that the researcher is never removed from the research process. The journal itself can be a physical book or an electronic journal, depending on your writing style (and ethical considerations). The important thing to keep in mind is that this journal is yours and does not need to be shared with anyone else (including your advisor). It is simply a way for you to keep track of your emotions, experiences, and evolution of positionalities, and you do not need to share this insight with anyone else (unless you so choose).

Step 2: Outline Positionalities

The second step is one that needs to be done prior to beginning data collection. I recommend sitting down with your journal of reflexivity and creating a brainstorm map, where you write your name in a bubble in the center of the page, and then write down all the positionalities you can think of that make up who you are. Write down all your identities and recognize that some might come more easily, especially if they are ones you very clearly and explicitly identify with (e.g., ethnicity, religion, gender). Other social locations might be more obscure, but no less important to the map (e.g., your preference for DC over Marvel; planner vs. spontaneous). This exercise is one that you should do on at least three different occasions prior to fieldwork to ensure that you have as exhaustive a map as possible—but know that it will never be completely exhaustive.
because we are made up of so many different positionalities, and we are not necessarily aware of all of them.

On the third occasion that you have listed your positionalities, go through the map, and highlight the ones that you think might be most important to the upcoming fieldwork experience. Some of the positionalities that I was aware of possessing prior to arriving in Sri Lanka were that I was a member of the Sri Lankan Tamil diaspora, that I spoke Tamil, that I loved to travel, that I was a PhD candidate, that I was anxious about the academic job market, and that I loved action movies. Once the positionalities have been mapped out, try to list the positionalities relevant to your fieldwork in hierarchical order. Which ones do you think should be most important to your fieldwork? Which ones are least important? In my case, the PhD candidate, and the student who was anxious about the job market were at the top of the hierarchy, and the tourist was closer to the middle. My love for action movies was near the bottom of the hierarchy. In listing them as a hierarchy, you are forced to explicitly consider that some positionalities will have needs that are more pressing or vital to your fieldwork than others. This realization will be helpful later when you are setting up your plan for data collection.

Step 3: Motivations and Oppositions

On a separate page of your reflexivity journal, create a table with three columns. Title the columns as positionalities, motivations, and oppositions (see Table 1). In the first column, write down the positionalities that you think will be most relevant to your fieldwork experience in the hierarchical order you determined in the previous step. (You can update this later as you will not be able to anticipate all relevant positionalities until you are in the field.) In the second column, write down all the interests or motivations of the corresponding positionalities. For example, for my positionality about being a PhD candidate, my motivations were that I wanted to collect interesting data that would push my research project forward and help create a dissertation that would successfully enable me to complete my doctorate degree. I was also motivated to prove myself as an emerging scholar.

<table>
<thead>
<tr>
<th>Positionality</th>
<th>Motivation</th>
<th>Oppositions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PhD candidate</td>
<td>- collect interesting data</td>
<td>- wanting to visit parents’ villages and connect with relatives takes time away from data collection</td>
</tr>
<tr>
<td></td>
<td>- write a compelling dissertation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- complete my doctoral degree</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- find a tenure-track position</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- establish myself as an emerging scholar</td>
<td></td>
</tr>
</tbody>
</table>
My motivations for my positionality as “lover of travel” was that I was excited to be going to Sri Lanka for the first time since I had left it when I was 3 years old. I was interested in seeing the places my parents grew up, and visiting the different regions of the island. Some of your motivations will be obvious and unproblematic, but others might be harder to recognize or admit. Keep in mind that while you will write down your motivations prior to leaving for your fieldwork, it is expected that you will revise the list during and after the trip. The process of reflexivity for qualitative research is an ongoing one, and doesn’t have concrete start or end points.

The third column is where you will consider the factors that might oppose or challenge the specific positionalities under discussion. It is here that you will write down how these challenges impact you. For example, in many ways, the PhD candidate and lover of travel could have mutual interests (e.g., traveling to different regions to do interviews also allow me to travel), but in other ways, these positionalities can be in direct opposition to one another. There are some important historic sites in Sri Lanka that I was very interested in seeing, but they were not located in the regions my participants would be. Furthermore, my love of travel might have me wanting to approach the towns I was visiting as a tourist, rather than a researcher, which could lead to me missing out on opportunities for important observational notes, as well as the opportunity to interact with key gate-keepers. For example, the tourist might be interested in going to art galleries, and while art is important, it is not directly related to my research topic and would not help me flesh out my research question (without changing the scope of my dissertation project).

In writing out the motivations and oppositions of our positionalities, we are better able to anticipate situations in the field that might cause inner conflict because two or more positionalities are in direct opposition to one another, and hold motivations that undermine the other. Therefore, it is also important to complete the next step prior to leaving for the field.

**Step 4: Create a Plan**

In the fourth step, we continue to engage in the process of reflexivity by considering how we can best address the needs of each positionality. In being able to intentionally target the motivations of each positionality’s
motivations, the researcher is better able to ensure that they are carrying out their research project effectively without having to sacrifice the intentions of their other positionalities. Therefore, in this step, the researcher should create a plan or a schedule for their fieldwork. If they know that they are interested in being a tourist, and in traveling, but they also want to conduct their interviews, it is imperative that they schedule time for both positionalities.

For my own doctoral dissertation, I was to spend 3 months in Sri Lanka. I had planned to roughly spend 1 month in each of the three sites that I was going to be collecting data. However, I also knew there were other parts of the island that I wanted to see that were not sites of recruitment. Therefore, I decided that I would allocate roughly 1 week in every month for non-research related activity. The week didn’t have to be seven consecutive days, but they would be 7 days during the month where I did not have to speak to gate-keepers, reach out to participants, or schedule interviews (unless I so desired). These would be seven guilt-free days where I could travel and see the island.

In setting aside 1 week for the “tourist” in me, I was allowing 3 weeks for the researcher every month. Therefore, I had to manage my time carefully to ensure that I was completing the number of interviews I wanted in each site, and was meeting the people I needed to meet. I was also able to schedule my “tourist” days around my research days, knowing that I was entitled to 7 days of holiday every month. In interspersing the holidays among the research days, I was able to meet the needs of both positionalities without having to put them into direct conflict. The tourist got her days, and the PhD candidate got her data.

The plan does not have to be written out as a daily chart unless that is your preference. Instead, the plan should demonstrate that you are addressing the needs of all the core positionalities that you think will impact your fieldwork. Therefore, if one of your positionalities is that of photographer, then carve out time to take photos that have nothing to do with your fieldwork. Research the places you want to go and take photos. And put the location and the amount of time you are allocating to this positionality into your plan. Similarly, if one of your positionalities is that of “foodie,” then plan out when you will visit the restaurants you really want to go to, and then maintain a plan for how you will stick to your research budget for the other days.

In going into the field with a plan, we can reduce time that would be spent having to manage expectations and disappointments. In being reflexive about who we are, and in being completely honest with ourselves that we are more than one-dimensional researchers, we can meet multiple needs—often simultaneously. But this cannot be done unless we have a clear plan, and unless we take the time to really reflect on who we are and what we want.

**Step 5: Stick to the Plan**

Despite all your planning prior to going in to the field, you will still find yourself discovering new positionalities, which have differing needs, or find that some positionalities strengthen, while others weaken. For example, the tourist may find herself particularly strong, and the researcher positionality can weaken—especially when you run into roadblocks with conducting your research project. It may be tempting to reshuffle your schedule
to give more time or space to one positionality’s needs over another. However, this reshuffling can only be justified in one case: when you realize that the hierarchy of positionalities has shifted.

If the positionalities that you had initially listed as being at the top of your hierarchy are no longer at the top, then it makes sense that you might want to revise your plan to prioritize the needs of other positionalities. For example, if you had set out to do 20 interviews, and you had set aside 3 months for this, but you finish this in 2 months, then it makes sense to re-evaluate your plan for that last month: “Do you still want to prioritize the researcher or is another positionality more pressing at this moment?” However, it is crucial that we differentiate from priorities actually shifting, and wanting our priorities to shift because of new interests that should not be high in the hierarchy in the context of fieldwork.

For example, I had set aside 1 week for playing tourist in every month. It was much easier to plan out the tourist days first, and make plans for those days (where I wanted to go, and where I was staying, etc.). Once these days were planned, it meant that all other days in that month must be related to my research project in some way. However, there were times when I was offered an opportunity to do an interesting activity that had no relevance to my research. I could not schedule this activity into my month unless I switched it for one of my tourist days. This means that just because my tourist needs may have heightened, it did not mean that I could change the plan. The tourist still was not more important than the PhD candidate in the hierarchy of positionalities, and I needed to remember this when scheduling.

The reverse is also true, just because the PhD candidate was at the top of the hierarchy, it did not mean that I should treat the needs of the tourist as optional. I made sure not to schedule interviews on days that I had set out as being for the tourist unless I was able to rearrange the schedule without losing days. In sticking to the plan, I was able to meet the needs of my positionalities without regret. Even though there were other parts of Sri Lanka I really wanted to go to, I could not fit the visits into my schedule without compromising my ability to conduct sufficient number of interviews. I knew that I would be sad that I didn’t go to those places, but I also knew that the regrets I would feel about disappointing the tourist would be nothing compared to the disappointment I would feel for not collecting strong data. Having a hierarchy and a clear plan made it much easier for me to stick to the plan.

However, there will be times during your fieldwork when you will encounter the unexpected, and you will need to modify your plan. For instance, I had placed a lot of trust in one primary gate-keeper for one of my sites, and he did not get back to me when I had hoped. To buy myself more time for recruitment, I shifted the order of site visits when I was in the field, so that this site was third instead of second. By the time I had to go to this site, I had heard back from the gate-keeper, and had managed to set up a few interviews. This would not have been feasible if I had stuck to the plan with complete rigidity. Therefore, while modification to your plan is acceptable, you need to ensure that the reason for it is completely justifiable; if not, then it is important that you stick as closely to the plan as you can.

Step 6: Maintain Your Reflexivity Journal

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Although Steps 2 and 3 were completed prior to entering the field, through the practice of maintaining your reflexivity journal, you can constantly monitor your positionalities throughout the research process, and recognize new ones as they emerge. Prior to entering the field, I was aware of many of my core positionalities, but there were other ones that became highlighted or further emphasized only after experiencing what it was like to do fieldwork in Sri Lanka. For example, although I knew being a Canadian citizen was one of my positionalities, I was not able to truly recognize and appreciate the rights and privileges of this positionality until I was in a country where many of these rights and privileges had been stripped from its citizens for decades. I also knew myself to be a member of the Sri Lankan Tamil diaspora, and that this would make me both an “insider” and an “outsider” with respect to the population I was studying; however, I was unable to recognize that part of what made me an outsider was the fact that I never had to live through the atrocities and hardships of a violent ethnic conflict that had eradicated much of its Tamil population. One positionality that I had not ranked high on my hierarchy was that I was a young, unmarried woman. This positionality became more important when I realized that people were hesitant to introduce me to unmarried male participants because we were in a society that still maintained some strict gender norms around respectability, and they wanted to maintain my virtue.

It is important to ensure that the practice of keeping your reflexivity journal becomes part of your daily routine—irrespective of the fact that there may be days when you are not conducting any research (e.g., tourist days). Whether or not your researcher self is at the forefront, all your experiences in the field impact your research, and it is valuable to keep track of this impact through the practice of reflexivity. This also becomes important data as it can help you contextualize your findings when you exit the field and move toward data analysis. For example, a few of my tourist days were spent in the “hill country” of Sri Lanka, where the infamous Ceylon tea plantations exist. Although I knew the history of the Indian Tamils who had been brought over to Sri Lanka generations ago to work the tea plantations, and knew of the challenges of identity and citizenship experienced by this population, all my knowledge was through texts. In going to this region of Sri Lanka, I was able to meet members of this population and hear their stories. These conversations were not part of my data as this population was not my target population, but these conversations inevitably shifted how I saw the Tamil identity, and Sri Lanka. In writing these thoughts down in my journal, I was able to mark down questions that I could explore at a future date—and perhaps in a future project.

The reflexivity journal helps to keep us accountable as researchers. It helps train us to ensure that we are vigilant about monitoring our subjectivities so that we can be proactive in not only knowing ourselves better, but in ensuring we are being ethical and protecting our participants from our biases as much as possible.

**Step 7: Be Gentle When the Plan Fails**

One of the biggest lessons that researchers learn is that the research process never goes completely as expected. This lesson is particularly pronounced for those of us who engage in human-subject work in the field. We cannot control whether people will speak to us, or if we will be able to conduct our interviews as we had planned. We may not be able to anticipate how weather or religious holidays may impact people’s
availability or willingness to do interviews. We also are not always able to control our own emotional and physical well-being in the field, which could also drastically impact the plan. Therefore, the last important step and perhaps hardest lesson for researchers is that we must be gentle with ourselves when everything does not go according to plan.

Even with the best laid plans, one cannot anticipate all possible eventualities in the field, and it is necessary to be able to revise our plans without feeling defeated that things did not pan out quite as we had hoped. Since I had planned on collecting data in three different sites, and I had 3 months to complete data collection, I decided to allocate 1 month per site. However, I had to return to one site again when I realized that while I may have had sufficient number of participants, I did not have enough male participants. I needed to revisit the first site to increase these numbers—or at least demonstrate that I had tried to increase these numbers. This was disappointing for me because it meant I had to completely revise my timeline, which meant that I would be spending less time in my other two sites.

As a graduate student who was collecting data for her dissertation, this made me feel very anxious, and I was plagued by questions of self-doubt. Did I do something wrong the first time around? What if I was unable to collect sufficient data to reach saturation? What if I had to come back to Sri Lanka? Would I have the funds and the time to do this? These kinds of doubts and concerns are to be expected, and what helped was writing them down in my reflexivity journal. In the process of writing, and in articulating my worries, I was able to recognize how my positionality as an unmarried woman might have impacted my ability to recruit men for my study. Therefore, I was able to strategize ways to overcome this for when I returned to this site. One way I did this was to approach various elders in the field and see if they would introduce me to male participants. I realized that if the elders saw it as acceptable, then it would be more likely that I would be able to increase the number of men who agreed to speak with me. In approaching the elders, I was also able to appease their concerns about protecting my “virtue” as a single woman by emphasizing the importance of my positionality as student—and the importance of completing my studies.

What I learned in looking back at this experience was that I couldn’t control everything that happened, and that some of the biggest obstacles that occurred in the field led to some of the richest rewards. In going back to the first site after being in the second site for some time, I was able to implement some of the modifications I had made to my interview guide in the second site. Furthermore, revisiting the first site after having spent more time in Sri Lanka also helped me contextualize the socio-political climate of the site in ways I had not picked up on in my first visit. The lesson here is that sometimes the plan must change, and part of the exciting elements of doing qualitative research is being able to engage with these changes and reflect on how these shifts impact the research process.

Conclusion

When I set out to do my data collection for my dissertation, I was unaware of these steps. I had learned about reflexivity and positionalities, but I only knew of these concepts in very broad strokes. I certainly did not
consider how different positionalities may have oppositional interests that would pull me in different directions when I was in the field. I quickly realized the importance of setting up a schedule to address these needs (particularly those of the researcher and the tourist). However, it would have helped greatly if I had been able to more explicitly map out my positionalities, and then prioritize the ones that I thought would be relevant to the research project (Step 2). This certainly would have helped me better understand why I was feeling so torn (Step 3), and better able to manage my time (Step 4). The steps I have listed here for you are the lessons that I had to learn the hard way, but which have helped me tremendously in my own practice of reflexivity in all subsequent research projects.

This is one of the most critical lessons to learn as a researcher: you will never do a project perfectly. You will always make mistakes, and you will always face obstacles. However, what helps is not to strive for a perfect research project, but instead a rich and rewarding one. And an important element to the creation of such a project is to know how to be reflexive. In learning how to be honest with ourselves about who we are and what we want, we are much more effective as researchers in recognizing the myriad of positionalities that impact our participants—and ultimately affect our findings. If we truly want a successful project, then we cannot just strive to understand the voices of the population under study, but must first learn how to listen to our own voices.

Even if you do not have a project in the works that require you to go out into the field, it does not mean that you cannot follow these steps. These steps can be applied to any research project. Take some time, reflect on your social locations. Reflect on what makes you who you are. Then consider how these positionalities might influence one another. And then continue practicing these skills because the list you make today will not be the list you write next week or next year. Just as your research interests will change over time, so too will your positionalities. And a strong qualitative researcher understands that if they want to understand others, they must be willing to understand themselves.

Exercises and Discussion Questions

1. What are your positionalities? Map them out, writing down everything that comes to mind.
   a. If your best friend/partner/parent were to write down the positionalities that they think you have, what would they write?
   b. Explain why you think the maps might be different.
      i. What might this suggest about who we are and how we are perceived? What are the implications of this when doing qualitative research with human subjects?

2. What are the advantages of maintaining a reflexivity journal? What are the challenges of maintaining a reflexivity journal?

3. Why do you think reflexivity is more commonly practiced among qualitative researchers than quantitative researchers?
a. What impact do you think engaging in reflexivity would have on quantitative research?

4. If you were to conduct a research project in a new location, how would you manage the needs of the tourist and the researcher?
   a. What are some possible locations that would make it difficult for your tourist positionality? What makes these locations difficult?

5. Generate a research topic that you would be interested in studying.
   a. What positionalities may have influenced your decision to study this topic?
   b. In what other ways might your positionalities impact your ability to study this topic?

Further Reading


References


