

Insider–outsider positions in health-development research: reflections for practice

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Recognising that the stance of investigators could make a major impact on the quality and/or interpretation of development-study findings, a small investigation to explore researcher positions and roles was implemented. This was a subsidiary component of a larger health-development study which aimed to explore the evidence base for psychosocial and mental-health policy formulation and implementation in two conflict-affected, low-resourced countries. Five of the research team were interviewed by a sixth member in an open, semi-structured interview format, and the data were analysed thematically. The primary learning for the team, with wider implications for others in development research and practice, is that if the aim is to produce credible findings from investigations of this nature, it is important to exhibit a high degree of transparency regarding the role and position of each researcher, and an explicit attempt to be reflexive in relation to the associated challenges.

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Introduction

Research concerning development and health almost invariably entails external agencies from outside a country working with recipient-‘insiders’. Those involved in the transnational partnership may have little in common in their customs and patterns of living, which creates many challenges for cross-cultural research of this nature. One challenge identified by Merriam *et al.* (2001) is that highlighting the researcher’s perspective (or position) is important in exploring the complexities of research across cultures and contexts, if practice is to improve. This article explores these issues within the context of a policy study in mental health, spanning two developing countries.

The positioning of researchers within the studies that they undertake has received considerable attention in the literature (see, for instance, Headland *et al.* 1990). Louis and Bartunek (1992) describe how, epistemologically, inquiry from the outside is more akin to a logical positivist approach – seeking one absolute truth – whereas enquiry from the inside more commonly

echoes an interpretative approach – acknowledging multiple realities. Recent refinements in research approaches have seen a blurring of this apparent separation, and these authors suggest that it is more appropriate to define the stance of researchers by the extent of their physical and psychological distance from the phenomenon being studied, and less by their paradigmatic position. Davies and Harre (1990) make a distinction between the researcher's 'position' and 'role', suggesting that role is relatively static, while position allows for movement. They explain that a person can keep the same role, in this case as a researcher, yet assume diverse positions while in that role, given the range of different social interactions taking place in the course of a research project. For the purpose of this article, we will use the definition of Louis and Bartunek, which identifies insider researchers as those who will have had a place in the social group being studied prior to the investigation commencing, whereas outsider researchers are those only beginning to relate to the phenomenon under study at the time of the research. We will more often use the term 'positioning' to denote our insider or outsider status.

In following qualitative research protocol in our primary study, we believe it is important to reveal relevant attributes of researchers, such as their positioning, as part of demonstrating methodological rigour, since in these studies the researcher becomes the 'instrument' (Ritchie 2001). It is also important to consider the special characteristics of development research (Martins *et al.* 2006). It is our belief that what makes development research different from orthodox ethnographic studies is that the latter seek to describe and explain 'what is', whereas development research seeks to address the rather messy but dynamic process of development, leading to findings that focus on 'what could be'.

Even more, if researchers are concerned to influence change in policy and practice, development research may also want to reveal 'how to get there'. Because we have been attempting to inform development in our two-country research study, we expect this will call for much engagement with insiders. We heed the words of Caine *et al.* (2007), who have explored participatory methodologies across cultures, and who report on the value of a convergence of critical insider and outsider stances to achieve maximum engagement.

With the above in mind, our team undertook this subsidiary investigation, asking: When undertaking an externally initiated research study in a developing country, what positions on the insider–outsider continuum have team members adopted? What are the advantages and disadvantages of the various positions? And are there lessons that may be applicable to enhance health-development research more broadly?

Method

The primary study, currently underway, seeks to improve the evidence base for psychosocial and mental-health policy formulation in two conflict-affected countries: Solomon Islands and Timor-Leste. Each country case study is exploring the issue from the perspectives of policy makers, service deliverers, and community members, using a multilevel, qualitative approach for data collection, data analysis, and theory development (SPHCM 2008). We have sought to ensure throughout that our work will feed into debates about policy and practice, and that it will be of value to the respective ministries of health and other stakeholders. Discussions among our team about how best to engage with our interviewees at each level in each country in order to reveal the richness and complexity potentially available led us to enquire into our own roles and positions. As one of our team asked: '*Should our roles be explicitly stated? What is it we are doing? In whose interests are we working?*'

Our gender-balanced team comprised four academics in public health and one in psychiatry, supported by one local, within-country member. The perceptions of the research team were

explored during data collection in the Solomon Islands phase in 2006–7. Five of the team were interviewed by a sixth member (JR) in an open, semi-structured interview format. Team members were each first asked where they saw themselves placed on the insider–outsider continuum. Questions followed concerning the value that they accorded to this position and its advantages and disadvantages, whether they felt they had moved position or stayed the same during the course of the research, and how they regarded the usefulness of making their position more explicit.

Four interviews were recorded with verbal agreement given at commencement, while the fifth was recorded in note form according to the preference of that team member. Analysis was undertaken (by JR) through repeatedly listening to the five interviews, searching for themes of interest and relevance raised by these team members, and transcribing only those sections that illustrated key themes. Both commonalities and differences deemed of interest across the interviews were considered worthy of being given a thematic label. The trustworthiness of these data and their analysis was confirmed in two sessions where the preliminary analysis was fed back to the research team to seek their agreement on the interpretation and to gain further input (Guba and Lincoln 1985).

Findings and discussion

Analysis of the interview data resulted in the identification of five dominant themes, which we labelled pre-existing stance, team continuum, relationship establishment, dynamic responsiveness, and transparency.

Pre-existing stance

All researchers in the team took it for granted that they entered into dialogue with participants in a role position initially dictated by their own pre-existing stance, with their position dictated by the presence of certain attributes shared with their primary study subjects (thus as an insider on entry) or absence of these (as an outsider). These aspects included their country of origin, tribal roots, first language, sex, specific geographical locality, religion, education, professional background, and/or political allegiance. At the same time, one team member acknowledged that interviewees would have been making their own assessment of the positions of the research team members. Our locally based researcher explained that he had entered the study aware of his insider status and all the benefits that his cultural understandings could bring, yet he was determined to step back and ‘try to stand in a neutral position’ in order to draw out community perceptions rather than impose his own. Another one of our team stated that his position was ‘as much an outsider as you can get’, but that he felt this was useful, given that he held ‘no preconceptions, no vested interests’. These contrasting perceptions echo the considerable literature on the differing yet complementary values placed on ‘emic’ (interpreting culture from the inside) and ‘etic’ (from the outside) research perspectives within ethnographic studies (Headland *et al.* 1990).

Team continuum

A second theme complemented the theme above. All felt that creating the team initially of people with various positions on the insider–outsider continuum could be very valuable in allowing the most appropriate researcher position to be used for collecting data in the most appropriate manner. This finding echoes the ‘distinct advantages’ found by Louis and Bartunek (1992) in working in teams deliberately composed of insiders and outsiders. In our study, this

aspect was felt to be very important in researching sensitive aspects of family or village mental health, since in some instances researchers indicated that interviewees were relieved that the interviewers had no close understanding of or local familiarity with the issues being raised. As one team member stated: *'I didn't want to be in the situation in their eyes of it all being too personalised'*. In other instances, the issue being investigated was so culture-dependent that unless the researcher was truly an insider, or deeply immersed in the culture and society, it was unlikely that sufficient understanding of the issue could be gained. For instance, this same researcher found that unexpected community responses regarding tribal tensions and land acquisition were due, in his eyes, to the fact that *'their culture is no longer intact'*, owing to the long-lasting social upheaval. The rest of the team had not recognised this loss, as they had no knowledge of the previous local situation.

Caine and colleagues (2007) suggest that it can be very fruitful to compose a team which partners those who have local cultural knowledge with external researchers who can query otherwise unquestioned local assumptions. Moreover, the ability for each researcher to take on both insider and outsider roles at more or less the same time has been explored by Hurworth and Argirides (2005) and termed *'role dualism'*. They point out that there is merit in acknowledging that one's position within a study can vary considerably: at times interacting supportively with informants and at other times stepping back to interpret the data more broadly. As one of our team commented: *'This is a normal human way of relating to those around us in our daily lives, so why not in our research?'*.

Relationship establishment

Most of the team felt that this kind of research needed constructive engagement with interviewees. Thus data collection was largely dependent on cultivating positive relationships and building trust; those working in the community-focused data collection particularly were adamant that only if trust was built could the study be confident of achieving credible findings. One female team member explained: *'a central aspect of this kind of research is having a relationship ... where mutual respect, mutual trust and reciprocal benefit are paramount'*. When asked how she set out to work with community members, she repeated the phrase *'joining with'* a number of times. For example, she explained that she wanted to build that relationship by *'joining with them, by using that part of me that already has a connection ... for instance, with the women, I used the fact that I was a woman'*.

This same team member indicated how much she had gained from her recent experiences in this country in a previous mission where she was an external consultant to this country's Ministry of Health. This experience gave her *'inside knowledge'*. Another team member questioned whether this made her an *'informed outsider'* rather than an insider. Her response was unambiguous: *'I would argue that the ease of my channel of entry [this time] was due to my insider connections up the line [from last time].'* This view that there is great benefit to be gained from building on already established relationships contrasted strongly with those of another team member who stated assertively that building a relationship prior to data collection involves a great risk that interviewees feel unable to express anything that they believe does not reflect the preferred views of the interviewer. He believed that too strong a relationship can be *'tricky'*: it risks leading to biased and non-credible findings and puts the interviewer on the defensive should anyone query that person's role as a previous *'active actor'*. He asked: *'Validity of data is the core issue. Are we biasing data? Is this research potentially threatening to participants?'* Vigorous discussion between the team members ensued on this last question during the team feedback sessions, but the polarity remained: the majority believed that credible

research of this nature is undoubtedly dependent on relationship building, while the questioner remained unconvinced.

Dynamic responsiveness

All team members agreed that their roles were not fixed but needed to react to changes both in the context of the research and over time, an issue raised by Davies and Harre (1990) on positioning movement, as discussed above. Sherif (2001) also reinforces the notion that researchers must accept shifts in their status during the research process, and reminds us that there is potential for the research itself to be changed in nature with these shifts. Team members' responses to the complexity of this development research were acknowledged in various ways. One described his role as 'evolving', becoming 'an insider by association' early in the data-collection phase; another stated that her position on the continuum was a 'moveable feast'. A third team member explained that she saw herself on either end of the continuum at various stages in the research; she made the interesting comment that she felt 'comfortable as an insider, and not so comfortable as an outsider'. When asked to expand on why she felt uncomfortable, she indicated that this was due to her feeling that, when an outsider, she felt like an objective judge wielding power, whereas when she felt herself to be an insider, she was aware of having a greater degree of shared understanding and a feeling of equality with those being interviewed.

Team members drew attention to the limitations arising from the short duration of country-based data-collection phases in the larger primary study. The constraints of funding and accessibility in the primary study meant that one member felt that the limited time available in-country posed '*a risk of superficiality*'. This team member was concerned that trying to build relationships over such a short term might reap relatively negative results, while he believed that a more distant outsider perspective which relied less on building trust might lead to sounder and more objective findings. A polarisation arose, as his view remained substantially different from those of the rest of the team for the duration of the research. However, this proved to be of benefit to the team, as his ongoing questioning was extremely valuable in getting the remaining members to query what we were doing and how best we could ensure that the research remained of high quality.

Transparency

The strongest theme emerging from the perspectives voiced by the five team members was that of transparency. Regardless of where each placed himself or herself on the continuum, all felt strongly that this kind of research lent itself to each member overtly identifying the location on the continuum from which he or she operated. It was apparent that this transparency and openness was felt by team members to be essential in order to work alongside each other effectively; in the words of a team member, '*One needs to continually reassess and reconsider our roles as we gather more data*'. This openness and reflectiveness is consonant with the general principle that reflexivity is integral to well-conducted qualitative research, where researchers go through a process of systematic review of their role and position in relation to the phenomenon being investigated, and aspects of this are usually included in the research report (Maher 1997; Von Maanen 2002).

However, it was also apparent that the team believed it was equally essential to be transparent with research participants. One member commented: '*We need to tell our participants "this is how much I know, but there is lots I don't". It's a matter of transparency. I am working as an outsider but with good inside credentials.*'

Reflections for future practice

In determining the extent to which each of us perceived ourselves to be insiders or outsiders in our primary study, we feel we have strengthened the soundness of our methodology and increased our awareness of what our data are telling us through our transparency and reflexivity. Although our findings are concerned with the primary study only, we believe they have implications for the wider field of health-development research and practice in any investigation or attempted implementation of ‘what could be’.

So, what have we learned that can be of use to others in the development field? First, that there is value in having a mix of insiders and outsiders in a team at the outset. We have learned that positions within this mix may shift, but that this movement, when appropriate, can contribute positively, as when we might position ourselves to be supportive of, and willing to interact with, key ‘insider’ issues and perspectives, or instead choose to be outside such decision making.

Second, we learned that being transparent with each other and with our development-research participants about the way each of us interpreted the data allowed us to see the extent to which each team member’s sex, ethnic background, professional training, and previous experiences and exposures influenced the way in which our different interpretations unfolded. These attributes were then not considered to be hidden biases, but merely transparent influences in putting together the findings as we saw them.

Third, we learned that this transparency allowed the power relations existing between team members to be exposed. In our own team, there was a strong sense of trust among us, and all showed a sense of responsibility in each taking their share of the workload, to the extent that we found no apparent restrictions on anyone having their say.

Finally, we learned that responding to this transparency in a reflexive manner allowed reciprocity: not only did the participants give for our gain, but we learned, especially when we provided feedback at a community meeting and later at a national workshop, that they felt that we had something to give them back for their benefit.

Although this small study endeavours to explain just one aspect of the very complicated, sensitive process that is health-development research, we believe that our findings are revealing and can add to the greater understanding of how research effort can contribute more constructively to practice.

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