



The Role of Context in Theorizing Qualitative Data

Workshop September 24th
The Ethnography Atelier
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Welcome

Plan for today:

- ▶ Discuss the concept of ‘context’, how we can understand, operationalize, and study context in ethnographic research, and what the role of context might be when we theorize based on our empirical work.
- ▶ I will share my experiences with grappling with context during my work
- ▶ I have brought a short exercise for your own work
- ▶ Time for questions and discussions – also along the way!



But first, a bit about me

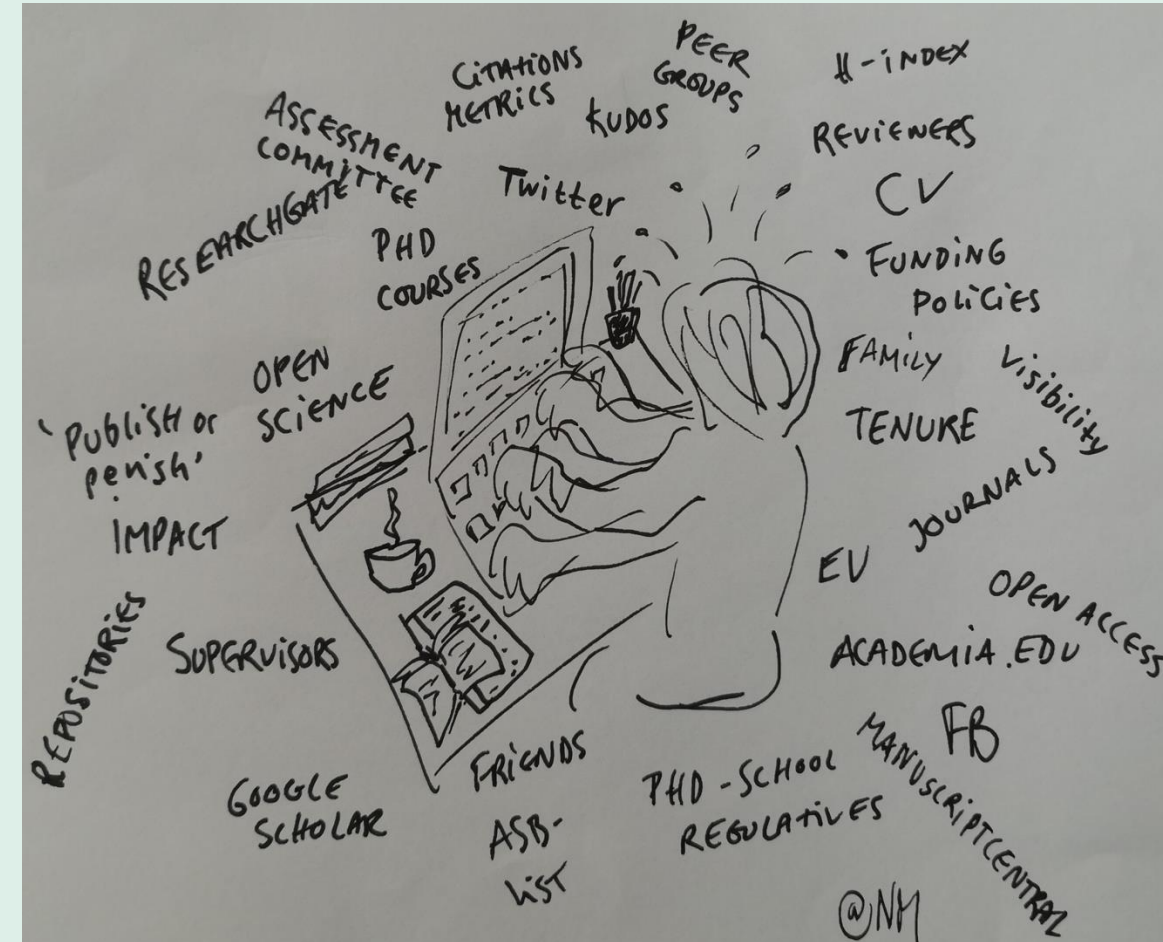
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- Associate professor in organisational sociology, Department of Sociology and Social Work, Aalborg University
- I study ‘contextual phenomena’: organizational change, sensemaking, leadership, coordination, clinical decision-making ...and I also study context
- Org ethnographic methods; shadowing – interviews – document analyses
- My PhD was a comparative case study of clinical managers’ work in four different clinical-organizational contexts (*How to operationalize and write about it? what and how does this matter for theorizing?*)
- I have been writing about context since my phd (slide in the back)
- Currently I work on context in relation to change and on context as constructed

My approach to academic writing

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- ▶ Systematic, analytic and creative practice, carried out under specific conditions
- ▶ Writing as craft: something you learn through repeated practice and participation in peer-feedback/review (ideally **collective reflection about work processes and quality – thank you EA!**)
- ▶ Multi-level: international, national, organizational, research field/group (community *and* network of practice)
- ▶ Writing as process AND product
- ▶ In academia - especially during your PhD - you have to learn how to write *while* you write
- ▶ Decisions about what to write, when and how to write, when writing is ‘good enough’, editing decisions, etc
- ▶ This ability is also learned through practice, training, and meta-reflection (*what am I learning about my writing right now that I need to remember going forward?*)





Theorizing as practice – as part of the craft

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- Theorizing as a practice is well-established and there are lots of great contributions to this approach
- I'll focus today's talk on the role of context in theorizing qualitative data
- For this, we need to talk about context, particularly:
 - how we understand and define it
 - how we operationalize and study context for our research phenomena in qualitative research
 - how & why this relationship between 'unit of analysis' and 'context' matters for what we can know and theorize

Constructed research phenomena – in constructed contexts!

- In a recent article, Alvesson and Sandberg (2024) argue that we need to pay more systematic attention to **how research phenomena are constructed** and use these insights to actively generate new research phenomena to study
- A & S show how we draw on theory, empirics and preunderstandings in this construction process
- However, research phenomena are studied in ‘contexts’
- Thus, we need to pay equally systematic attention to **how research contexts are constructed**, *empirically* as well as *theoretically*, and what the consequences of our construction may be for theorizing, contribution, and the boundary conditions of our work

Context in qualitative research

- In much research, context is either overlooked or the concept is used in a very general manner as a taken-for-granted and stable background for the phenomenon studied, creating a ‘black box’ effect.
- This approach to context usually assumes that both phenomenon and context are stable entities that can be identified and studied with relative ease - *this has not been my experience*
- Increasingly, research recognizes that ‘context’ is an analytical framing researchers construct as part of the research process
- My take is that both research phenomena and contexts are constructed, and that phenomenon and context are (can be) ‘moving targets’ during a research process
- Because they co-constitute each other, they both develop in complex ways as the research process and our understanding of what we are doing unfolds
- And as a result, I think we need to develop our conversation around this aspect of research - *how does this connection look in practice and how does one go about specifying and qualifying it?*

Context in qualitative research

Context is important for several aspects of qualitative research:

- For exploring and understanding the research phenomenon in real life setting/s
- For developing engaging and trustworthy qualitative research
- For presenting qualitative research findings in a meaningful, ‘persuasive’ manner
- For discussions of analytical generalizability, comparability, or scope conditions, where it is used to specify “the context” in which a construct applies
- For theorizing, for example via case study designs
- As a heuristic that helps you challenge your assumptions and what you think you know
- Context is also linked to the quality and boundary conditions of research

(slides in the back with references/suggestions for further reading)

*Very
different
approaches
to context
and how it
matters!*

The many ways 'context' might matter ...

- ▶ During the construction of your research phenomenon?
- ▶ In relation to philosophy of science?
- ▶ For your work with design and choice of methods?
- ▶ In relation to your analysis and theorizing?
- ▶ In writing?
- ▶ What else?




My grapplings with context – a starting point

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- A study of clinical managerial work as it is practiced in four different clinical-organisational contexts



- **I began by asking: what is context?** ... "Well, that depends..."
 - What does this concept refer to? "In a healthcare context" – but what does this mean? Background? Frame? "Macro"? "Outer layers"??
- 
- Sue and I then asked: **how is context defined?** (not really ...)
 - And then: **how is the concept of context used** in research designs, in research practice, and in writing?
And **how does it matter, the way people use 'context' in their work?**

This focus on context came out of my empirical work

- 2009-2013: Case study of clinical managerial work in four hospital units
- Design principle: each hospital unit represented a different clinical - organisational context for my phenomenon – selected for variation on characteristics of organizing and the nature and practice of healthcare work

Elective orthopaedic surgery	Diagnostic imaging	Internal medicine (pulmonary diseases)	Stroke rehabilitation
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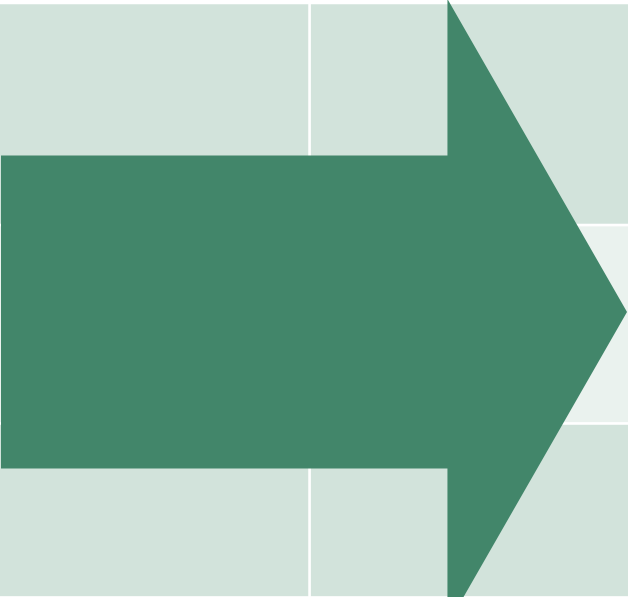
- Operationalising and studying ‘context’ for clinical managerial work proved to be the most challenging aspect
- What counts/doesn't count as context and why? When is 'enough'? How do I decide all these things?*
- Is ‘**what is the context for ...**’ the right, or even the most interesting, question?
- And how do I write about 'the context' so others understand and can evaluate the work?*

Studying organisational coherence

- A 3-year comparative case study of managers’ and staffs’ efforts to produce organisational coherence across professional, disciplinary, organisational, and geographical boundaries in the Danish healthcare system (public sector)
- Org ethnography: shadowing, interviews and documents
- Different clinical-organisational contexts – yet they point to the same organisational challenges
 1. Fragmentation/siloed work
 2. Unpredictability and variation in day-to-day work
 3. Moving from agreements to collaboration
 4. Pace of work and accelerated pathways

So how do these challenges unfold within each case?

Initial questions:
 What is particular to each context and how?
 What is shared across contexts and how?

Phase one: mapping current practices [problems]	Phase two: shadowing development practices [solutions]	Phase three: shadowing implementation practices [stability]
Acute care/Emergency department – acutely ill/injured		
Internal Medicine/Medical Ward –chronic illness w. co-morbidity		
Oncology/Oncology Ward – severe/life-threatening illness		

This led us to suggest a definition

How can we operationalize and study contexts?

Context is “*a relational construct that specifies what is at any given point considered the background for understanding a phenomenon or event. This background/foreground relationship is continually constructed by people, as they make sense of their experiences and the social worlds in which they engage*” (Meier & Dopson 2019, p. 3).



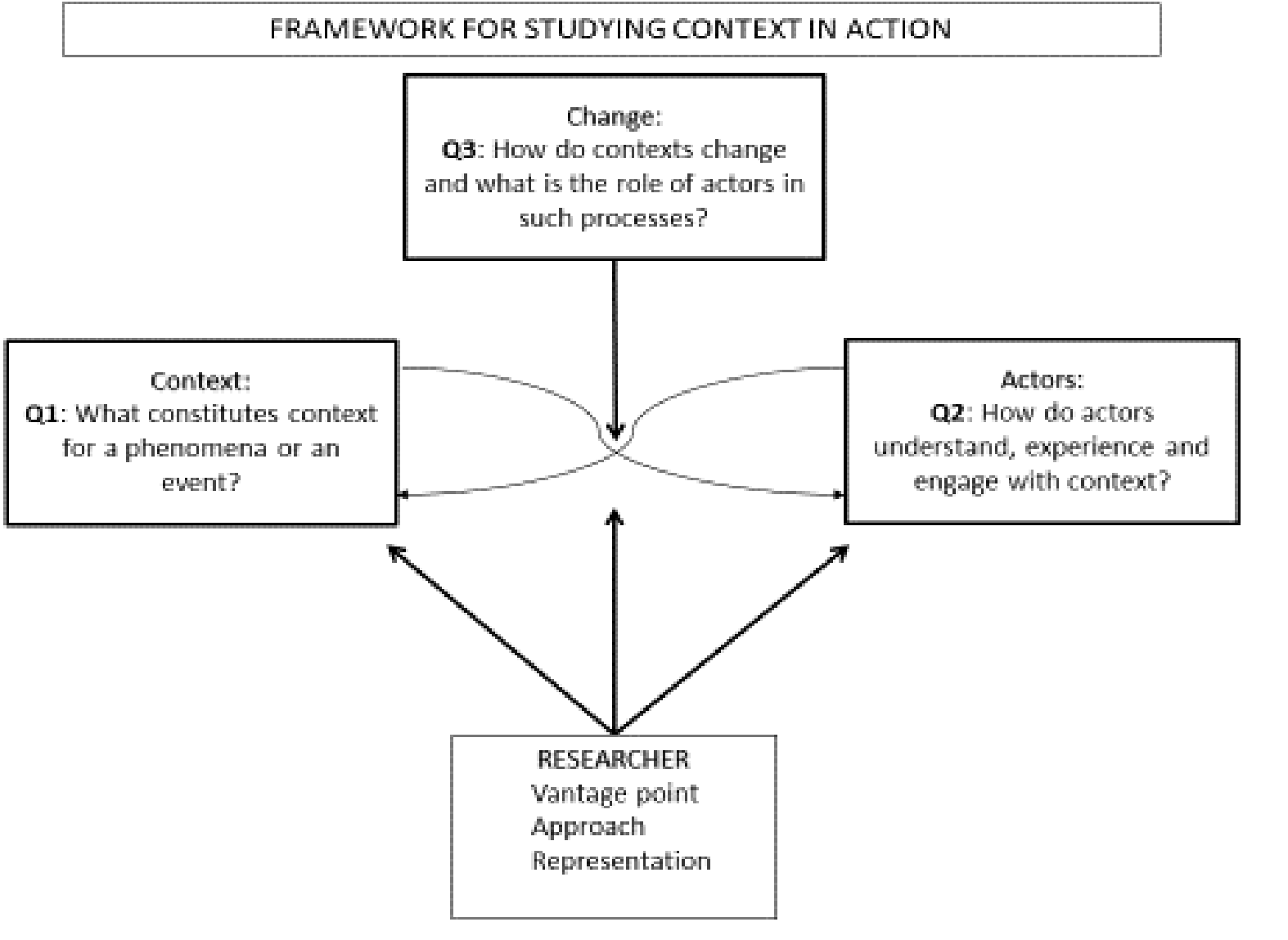
This then led to us to **two key questions:**

1) **What is the relationship between context - action - change? And how can researchers operationalize and study contexts in action?**

Meier, N and Dopson, S. (eds.) (2019):
Context in Action and How to Study it: Illustrations from Healthcare. Oxford: Oxford University Press.

2) **How does the phenomenon-context relationship change, depending on your focus?**

- **Meier, N. & Dopson, S., (2021).** What is context? Methodological reflections on the relationship between context, actors, and change. In *Managing Healthcare Organisations in Challenging Policy Contexts*. Kislov, R., Burns, D., Mørk, B. E. & Montgomery, K. (red.). Palgrave Macmillan
- Here we used Covid-19 as example



Meier & Dopson 2021

Context and temporality

- Typical references to context: **Spatial and stable** - setting, environment, background, place, frame, surroundings, ‘outer’-‘inner’ context [layers, center – periphery]
- But this vocabulary is not helpful when contexts are constructed, enacted, dynamic and changeable
- How do we understand and write about contexts in this view?
- What are the theoretical and methodological implications of ‘contexts as dynamic processes, ongoing achievements’?
- Example: how are contexts-actions-changes linked from a process or practice-based approach?
 - 1) How do we characterize the change process/es that we aim to study?
 - 2) How can ‘contexts’ be studied as they change over time?
 - 3) How is ‘dynamic context’ defined and studied?

My approach to theorising – abductive approach, qualitative methods and case studies

- I use an abductive approach, case designs, qualitative methods – these help my thinking (what supports yours?)
- In the important start phase: I pilot studies, drawings, curiosity, doubt, not-knowing, heuristics, iterations of engagements with empirics and theory
- In reading - I like to produce tables/figures/outlines of what I am reading, so I can visualise the ‘conversation’ and my potential contribution, and qualify this as I learn more
- In writing - to help the reader understand the research phenomenon and the context, I use vignettes, thick descriptions, tables and figures (and friendly reviewers who can help you understand what you (still) need to do)
- I make space for informal conversations and reading about theorizing (‘OrgSoc theory talks’)

A short exercise with your own work

1. Choose a specific piece of work
2. In this, what do you think is ‘the relevant context’ for your research phenomenon?
3. How do you define/operationalize and study this? (Q1, Q2, Q3 or ...?)
4. What might the consequences be for your theorizing? What do you think is *particular*/how?/why? – what is *analytically generalizable* beyond this context? Boundary conditions?
5. What would your reader need to know to follow your argumentation and understand your findings?





Thank you!

- **Meier, N.** (2023). Unpacking Contexting and Institutionalizing as Complex Sustaining Practices. Comment on “Sustaining Knowledge Translation Practices: A Critical Interpretive Synthesis”. *International Journal of Health Policy and Management*. https://www.ijhpm.com/article_4388.html
- **Meier, N.** & Dopson, S. (2022). *Context and Temporality*. Paper presented at 13th Organisational Behaviour in Health Care (OBHC) Conference, Birmingham University. September 12-14th, 2022.
- **Meier, N.** & Dopson, S., (2021). What is context? Methodological reflections on the relationship between context, actors, and change. In *Managing Healthcare Organisations in Challenging Policy Contexts*. Kislov, R., Burns, D., Mørk, B. E. & Montgomery, K. (red.). Palgrave Macmillan
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