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## RECONTEXTUALIZING OBSERVATION

### *Ethnography, Pedagogy, and the Prospects for a Progressive Political Agenda*

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Observation has been characterized as “the fundamental base of all research methods” in the social and behavioral sciences (Adler & Adler, 1994, p. 389) and as “the mainstay of the ethnographic enterprise” (Werner & Schoepfle, 1987, p. 257). Even studies that rely mainly on interviewing as a data collection technique employ observational methods to note body language and other gestural cues that lend meaning to the words of the persons being interviewed. Social scientists are

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**Author’s Note.** This chapter builds on the essay, “Rethinking Observation: From Method to Context” (Angrosino & Pérez, 2000), which appeared in the second edition of the *Handbook*. In that chapter, we argued that observation-based ethnographic research is not so much a specific method of inquiry as a context in which new ways of conducting qualitative research are emerging. I suggested that researchers’ activities were developing in response to a greater consciousness of situational identities, the ethical demands of the modern research enterprise, and relationships of relative power in the field setting, particularly in reference to studies dealing with gender, sexuality, and people on the sociocultural margins (e.g., people with disabilities). The current chapter explores the ramifications of seeing observational research as context, with an emphasis on a convergence of pedagogy and political action in service to a progressive social agenda.

observers both of human activities and of the physical settings in which such activities take place. Some such observation may take place in a laboratory or clinic, in which case the activity may be the result of a controlled experiment. On the other hand, it is also possible to conduct observations in settings that are the “natural” loci of those activities. Some scholars have criticized the very concept of the “natural” setting, particularly when fieldwork is conducted in Third World locations (or in domestic inner-city sites) that are the products of inherently “unnatural” colonial relationships (Gupta & Ferguson, 1996, p. 6), but the designation is still prevalent throughout the literature. In that case, it is proper to speak of “naturalistic observation,” or fieldwork, which is the focus of this chapter.

Observations in natural settings can be rendered as descriptions either through open-ended narrative or through the use of published checklists or field guides (Rossman & Rallis, 1998, p. 137; for an historical overview of this dichotomy, see Stocking, 1983a). In either case, in the past it was generally assumed that naturalistic observation should not interfere with the people or activities under observation. Most social scientists have long recognized the possibility of observers affecting what they observe; nonetheless, careful researchers were supposed to adhere to rigorous standards of objective reporting designed to overcome potential bias. Even cultural anthropologists, who have usually thought of themselves as “participant observers” and who have deliberately set out to achieve a degree of subjective immersion in the cultures they study (Cole, 1983, p. 50; Wolcott, 1995, p. 66), still claim to be able to maintain their scientific objectivity. Failure to do so would mean that they had “gone native,” with their work consequently being rendered suspect as scientific data (Pelto & Pelto, 1978, p. 69). The achievement of the delicate balance between participation and observation remains the ideal of anthropologists (Stocking, 1983b, p. 8), even though it is no longer “fetishized” (Gupta & Ferguson, 1996, p. 37). Objectivity remains central to the self-images of most practitioners of the social and behavioral sciences. Objective rigor has most often been associated with quantitative research methods, and the harmonization of empathy and detachment has been so important that even those dedicated to qualitative methods have devoted considerable effort to organizing their observational data in the most nearly objective form (i.e., the form that looks most quantitative) for analysis (see, e.g., Altheide & Johnson, 1994; Bernard, 1988; Miles & Huberman, 1994; Silverman, 1993).

Adler and Adler (1994), in fact, suggested that in the future observational research will be found as “part of a methodological spectrum,” but that in this spectrum it will serve as “the most powerful source of validation” (p. 389). Observation, they claimed, rests on “something researchers can find constant,” meaning “their own direct knowledge and their own judgment” (p. 389). In social science research, as in legal cases, eyewitness testimony from trustworthy observers has been seen as a particularly convincing form of verification (Pelto & Pelto, 1978, p. 69). In actuality, the production of a convincing narrative report of the research has most often served as *de facto*

validation, even if the only thing it validates is the ethnographer's writing skill and not his or her observational capacities (Kuklick, 1996, p. 60).

Postmodernist analysts of society and culture certainly did not invent the current critique of assumptions about the objectivity of science and its presumed authoritative voice, but the prevalence of that analysis in contemporary scholarship has raised issues that all qualitative researchers need to address. The postmodernist critique is not necessarily directed toward the conduct of field-based observational research, but it is impossible to consider postmodern discourse on the production and reproduction of knowledge without taking into account the field context from which so much of our presumed "data" are said to emerge. Earlier criticism of field-workers might have been directed at particular researchers, with the question being whether they had lived up to the expected standards of objective scholarship. In the postmodernist milieu, in contrast, the criticism is directed at the standards themselves. In effect, it is now possible to question whether observational objectivity is either desirable or feasible as a goal. Clifford (1983a), who has written extensively and critically about the study of culture and society, even called into question the work of the revered Bronislaw Malinowski, the archetype of the scientific participant observer who, according to Stocking (1983a), is the scholar most directly responsible for the "shift in the conception of the ethnographer's role, from that of inquirer to that of participant 'in a way' in village life" (p. 93). Perhaps more surprisingly, Clifford (1983a) also questioned the research of the very influential contemporary interpretivist Clifford Geertz, whom he took to task for suggesting that the ethnographer, through empathy, can describe a culture in terms of the meanings specific to members of that culture. In other words, the ethnographer, as a distinct person, disappears—just as he or she was supposed to do in Malinowski's more openly positivistic world. This assessment was echoed by Sewell (1997), who pointed out that Geertz did not expect field-workers to "achieve some miracle of empathy with the people whose lives they briefly and incompletely share; they acquire no preternatural capacity to think, feel, and perceive like a native" (p. 40). The problem is not that Geertz failed to achieve some sort of idealized empathetic state; rather, the question is whether such a state is even relevant to ethnographic research and whether it is desirable to describe and/or interpret cultures as if those depictions could exist without the ethnographer's being part of the action.

The postmodernist critique, which emphasizes the importance of understanding the ethnographer's "situation" (his or her gender, class, ethnicity, etc.) as part of interpreting the ethnographic product, is particularly salient because the remote, traditional folk societies that were the anthropologist's stock-in-trade have virtually disappeared. Most cultural anthropology now is carried out in communities that, if not literate themselves, are parts of larger literate societies that are themselves parts of global communication and transportation networks. Like sociologists, anthropologists now "study up" (i.e., they conduct research among elites), if only to help them understand

the predicament of the poor and marginalized people who remain their special concern. Doing so overcomes some of the problems associated with the lingering colonialist bias of traditional ethnography (Wolf, 1996, p. 37), but it raises new issues regarding the position and status of the observational researcher. For one thing, ethnographers can no longer claim to be the sole arbiters of knowledge about the societies and cultures they study because they are in a position to have their analyses read and contested by those for whom they presume to speak (Bell & Jankowiak, 1992; Larcom, 1983, p. 191). In effect, objective truth about a society or culture cannot be established because there are inevitably going to be conflicting versions of what happened. Sociologists and other social scientists were working in such settings long before anthropologists came onto the scene and were already beginning to be aware of the problems inherent in claiming the privilege of objective authoritative knowledge when there are all too many “natives” ready and able to challenge them. As Wolf (1992) wryly commented,

We can no longer assume that an isolated village will not within an amazingly short period of time move into the circuit of rapid social and economic change. A barefoot village kid who used to trail along after you *will* one day show up on your doorstep with an Oxford degree and your book in hand. (p. 137)

The validity of the traditional assumption—that the truth can be established through careful cross-checking of ethnographers’ and insiders’ reports—is no longer universally granted because contemporary social and behavioral scientists are increasingly inclined to expect differences in testimony grounded in gender, class, ethnicity, and other factors that are not easy to mix into a consensus. Ethnographic truth has come to be seen as a thing of many parts, and no one perspective can claim exclusive privilege in the representation thereof. Indeed, the result of ethnographic research “is never reducible to a form of knowledge that can be packaged in the monologic voice of the ethnographer alone” (Marcus, 1997, p. 92).

Ethnographers of various disciplines have responded to this new situation by revising the ways in which they conduct observation-based research and present their analyses of this research. No longer can it be taken for granted that ethnographers operate at a distance from their human subjects. Indeed, the very term *subject*, with its implicit colonialist connotations, is no longer appropriate. Rather, there is said to be a *dialogue* between researchers and those whose cultures/societies are to be described. “Dialogue” in this sense does not literally mean a conversation between two parties; in practice, it often consists of multiple, even contradictory, voices. As a result, discussions of ethnographers’ own interactions, relationships, and emotional states while in the field have been moved from their traditional discreet place in acknowledgments or forewords to the centers of the ethnographies themselves. The increasing acceptance of autoethnography and performance-based ethnography has also resulted in a greater personalization of the activities of the researchers (see, e.g., Bochner & Ellis, 2002; see also Holman Jones, Chapter 7, this volume). Although these practices have certainly opened up new

horizons in ethnographic reportage, they raise further issues of their own. For example, because it is likely to be the ethnographers who write up (or at least collate or edit) the results of field studies, do they not continue to claim the implicit status of arbiters/mediators of social/cultural knowledge (Wolf, 1992, p. 120)? Ethnographers may assert that they represent the many voices involved in the research, but we still have only their assurance that such is the case.

Nonetheless, we now function in a context of “collaborative” research. *Collaboration* no longer refers only to the conduct of multidisciplinary teams of professional researchers; it often means the presumably equal participation of professional researchers and their erstwhile “subjects” (Kuhlmann, 1992; Wolf, 1996, p. 26). Matsumoto (1996), for example, sent a prepared list of questions to the people she was interested in interviewing for an oral history project. She assured them that any questions to which they objected would be eliminated. The potential respondents reacted favorably to this invitation to participate in the formulation of the research design. As such situations become more common, it is important that we rethink our current notions about “observation”—what it is, how it is done, what role it plays in the generation of ethnographic knowledge. To that end, it might be useful to shift from a concentration on observation as a “method” per se to a perspective that emphasizes observation as a context for interaction among those involved in the research collaboration.

## ■ OBSERVATION-BASED RESEARCH: TRADITIONAL ASSUMPTIONS

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Observational researchers traditionally have attempted to see events through the eyes of the people being studied. They have been attentive to seemingly mundane details and to take nothing in the field setting for granted. They were taught to contextualize data derived from observation in the widest possible social and historical frame, all without overgeneralizing from a necessarily limited (and probably statistically nonrepresentative) sample. Their research design usually involved the use of as many means of data collection as were feasible to supplement purely observational data. Although observational research has played a part in many different schools of social theory, it has been most prominently associated with those orientations that seek to construct explanatory frameworks only after careful analysis of objectively recorded data.

There are three main ways in which social scientists have conducted observation-based research. Despite considerable overlap, it is possible to distinguish among (a) participant observation, grounded in the establishment of considerable rapport between the researcher and the host community and requiring the long-term immersion of the researcher in the everyday life of that community; (b) reactive observation, associated with controlled settings and based on the assumption that the people being

studied are aware of being observed and are amenable to interacting with the researcher only in response to elements in the research design; and (c) unobtrusive (nonreactive) observation, conducted with people who are unaware of being studied.

All forms of observational research involve three procedures of increasing levels of specificity: (a) descriptive observation (the annotation and description of all details by an observer who assumes a nearly childlike stance, eliminating all preconceptions and taking nothing for granted), a procedure that yields a large amount of data, some of which will prove to be irrelevant; (b) focused observation (where the researcher looks only at material that is pertinent to the issue at hand, often concentrating on well-defined categories of group activity such as religious rituals and political elections); and (c) selective observation (focusing on a specific form of a more general category such as initiation rituals and city council elections). (For an elaboration of these points, see Werner & Schoepfle, 1987, pp. 262–264.)

Underlying these various methodological points was the assumption that it is both possible and desirable to develop standardized procedures that can “maximize observational efficacy, minimize investigator bias, and allow for replication and/or verification to check out the degree to which these procedures have enabled the investigator to produce valid, reliable data that, when incorporated into his or her published report, will be regarded by peers as objective findings” (Gold, 1997, p. 397). True objectivity was held to be the result of agreement between participants and observers as to what is really going on in a given situation. Such agreement was obtained by the elicitation of feedback from those whose behaviors were being reported. Ethnography’s “self-correcting investigative process” has typically included adequate and appropriate sampling procedures, systematic techniques for gathering and analyzing data, validation of data, avoidance of observer bias, and documentation of findings (Clifford, 1983b, p. 129; Gold, 1997, p. 399). The main difference between sociological and anthropological practitioners of ethnography seems to be that the former have generally felt the need to validate their eyewitness accounts through other forms of documentation, whereas the latter have tended to use participant observation—“relatively unsystematized” as it might be—as the ultimate reality check on “all the other, more refined research techniques” (Pelto & Pelto, 1978, p. 69).

One classic typology (Gold, 1958) divided naturalistic researchers into “complete participants” (highly subjective and, hence, scientifically questionable), “participants-as-observers” (insiders with a little bit of scientific training but still not truly acceptable as scientists), “observers-as-participants,” and “complete observers.” Gold (1997) went on to advocate a form of ethnographic research that seeks to collect data that are “grounded in the informants’ actual experience” (p. 399). He insisted on the continuing importance of maintaining standards of reliability and validity through “adequate and appropriate sampling procedures, systematic techniques for gathering and analyzing data, validation of data, avoidance of observer bias, and documentation of findings,” although he admitted that such goals are met in ethnographic research “in ways that differ from conventional (statistical) procedures” (p. 399).

A somewhat different perspective is represented by Adler and Adler (1987), who emphasized a range of “membership roles” as opposed to roles defined relative to some presumed ideal of pure observation. This shift was occasioned by the realization that pure observation was, first, nearly impossible to achieve in practice and, second, ethically questionable, particularly in light of the evolving professional concern with informed consent. Therefore, Adler and Adler wrote about (a) peripheral member researchers (those who believe they can develop a desirable insider’s perspective without participating in those activities that constitute the core of group membership), (b) active member researchers (those who become involved with the central activities of the group, sometimes even assuming responsibilities that advance the group without necessarily fully committing themselves to members’ values and goals), and (c) complete member researchers (those who study settings in which they are already members or with which they become fully affiliated during the course of research). In the scholarly world prior to the ascendancy of the postmodernist critique, even complete member researchers, who were expected to celebrate the “subjectively lived experience,” were still enjoined to avoid using their insider status to “alter the flow of interaction unnaturally” (Adler & Adler, 1994, p. 380).

## ■ OBSERVATION-BASED RESEARCH: CURRENT ASSUMPTIONS

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Contemporary observation-based social research may be characterized by the following trends. First, there is an increasing willingness on the part of ethnographers to affirm or develop a “membership” identity in the communities they study. Second, researchers recognize the possibility that it may be neither feasible nor possible to harmonize observer and insider perspectives so as to achieve a consensus about “ethnographic truth.” Thus, there is a recognition that our erstwhile “subjects” have become collaborators, although they often speak in a voice different from that of hegemonic authoritative science.

Traditional researchers’ concern with process and method, therefore, has been supplemented with (but by no means supplanted by) an interest in the ways in which ethnographic observers interact with, or enter into a dialogic relationship with, members of the group being studied. In light of these trends, an earlier incarnation of this chapter suggested that observation-based ethnographic research was not so much a specific method of inquiry as a context in which new roles for the qualitative researcher were emerging. Research roles were said to be developing in response to a greater consciousness of situational identities and to the perception of relative power, particularly in reference to studies dealing with gender, sexuality, and people on the sociocultural margins (e.g., people with disabilities). (For a detailed review of research illustrating these trends, see Angrosino & Pérez, 2000, pp. 678–690.)

At this point, however, it no longer seems fruitful to go on arguing the case for rethinking observation. The numerous studies cited by Angrosino and Pérez (2000) demonstrate quite plainly that the new perspective is already part and parcel of the conceptual framework and methodological toolkits of a wide range of contemporary qualitative researchers.<sup>1</sup> If the battle cannot be said to have been definitively won, there is no longer any doubt that the traditional view—with its fixation on objectivity, validation, and replicability—is now simply one point on a continuum and not the unique voice of reputable social research. The pressing question that now faces us is the following: How do we move this new perspective beyond the confines of academic discourse and ensure its relevance in ways that help us to advance a progressive social agenda?

## ■ THE ETHICAL DIMENSION OF OBSERVATION-BASED RESEARCH

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Before answering the question at the end of the previous section directly, we must first consider the matter of ethics as it bears on the conduct of observation-based research. Ethics concerns us on two levels. First, we must take into account the current standards operative in most universities and other research institutions that govern the ways in which we work. Second, and perhaps more important in the long run, is the matter of what we mean by a “progressive social agenda.” In other words, what values may we invoke to explain and justify the ways in which we seek to use our ethnographic knowledge?

### Institutional Structures

Observation was once thought of as a data collection technique employed primarily by ethnographers who thought of themselves as objective researchers extrinsic to the social settings they studied. It has become a context in which researchers who define themselves as members of those social settings interact with other members of those settings. This transition has also effected a shift in the parameters of research ethics.

For good or ill, virtually all social research in our time is governed by the structure of institutional review boards (IRBs), which grew out of federal regulations, beginning in the 1960s, that mandated informed consent for all those participating in federally funded research. Rules governing the use of human subjects are “rooted in scandal” (Gunsalus, 2002, p. B24), specifically the scandal of experiments that led to injury or even death of participants. The perceived threat was from “intrusive” research (usually biomedical). The new rules were designed so that participation in such research would be under the control of the “subjects,” who had a right to know what was going to happen to them and who were expected to agree formally to all provisions of the research. The right of informed consent, and the IRBs that were eventually created to enforce it at all institutions receiving federal moneys (assuming a



function originally carried out centrally by the U.S. Office of Management and Budget), radically altered the power relationship between the researcher and the human subject, allowing both parties to have a say in the conduct and character of research. (For more detailed reviews of this history, see Fluehr-Lobban, 2003; Wax & Cassell, 1979.) Although few would criticize the move toward protection of human subjects and the concern for their privacy, the increasingly cautious approach of IRBs and their tendency to expand their jurisdiction over all aspects of the research process have turned IRBs into “de facto gatekeepers for a huge amount of scholarly inquiry” (Gunsalus, 2002, p. B24).

Ethnographic researchers, however, have always been uncomfortable with this situation—not because they wanted to conduct covert harmful research but rather because they did not believe that their research was intrusive. Such a claim stemmed from the assumptions typical of the observers-as-participants role, although it is certainly possible to interpret it as a relic of the “paternalism” that traditional researchers often adopted with regard to their human subjects (Fluehr-Lobban, 2003, p. 172). Ethnographers were also concerned that the proposals sent to IRBs had to be fairly complete when it came to explicating the methodology so that all possibilities of doing harm could be adequately assessed. Their research, they argued, often grew and changed as it went along and could not always be set out with the kind of predetermined specificity that the legal experts seemed to expect. They further pointed out that the statements of professional ethics promulgated by the relevant disciplinary associations already provided for informed consent; thus, the IRBs were being redundant in their oversight.

During the 1980s, social scientists won from the U.S. Department of Health and Human Services an exemption from review for all social research except that dealing with children, people with disabilities, and others defined as members of “vulnerable” populations (Fluehr-Lobban, 2003, p. 167). Nevertheless, legal advisers at many universities (including the University of South Florida [USF], where I am based) have opted for caution and been very reluctant to allow this near blanket exemption to be applied. Indeed, at USF, proposals that may meet the general federal criteria for exemption must still be reviewed, although they may be deemed eligible for an “expedited” review. Even proposals that are completely exempt (e.g., studies relying on on-the-record interviews with elected officials about matters of public policy) must still be filed with the IRB. It is ironic that one type of observational research is explicitly mentioned in the “exempt” category—research that is “public” (e.g., studying patterns of where people sit in airport waiting rooms). This is one of the increasingly rare remaining classic “pure observer” types of ethnography. The exemption, however, is disallowed if the researcher intends to publish photos or otherwise identify the people who make up the “public” being researched.

USF now has two IRBs: one for biomedical research and one for “behavioral research.” Because the latter is dominated by psychologists (by far the largest department in the social sciences division of the College of Arts and Sciences), this separate status rarely works to the satisfaction of ethnographic researchers. The

psychologists, who are used to dealing with hypothesis-testing, experimental clinical or lab-based research, have been reluctant to recognize a subcategory of “observational” research design. As a result, the form currently required by the behavioral research IRB is couched in terms of the individual human subject rather than in terms of populations or communities, and it mandates the statement of a hypothesis to be tested and a “protocol for the experiment.” Concerned ethnographers at USF have discovered that some other institutions have developed forms more congenial to their particular needs, but as of this writing they have had no success in convincing the USF authorities to adopt any of them as an alternative to the current “behavioral research” form for review. Indeed, the bias in favor of clinical research seems to have hardened. For example, of the many hundreds of pages in the federal handbook for IRBs, only 11 paragraphs are devoted to behavioral research (Gunsalus, 2002, p. B24). Moreover, it is now mandated that all principal investigators on IRB-reviewed research projects take continuing education on evolving federal ethical standards. It is possible to do so over the Internet, but during the 2001–2002 academic year, all of the choices of training modules were drawn from the realm of health services research.

### Issues for Contemporary Observational Researchers

Ethical ethnographers who adopt more clearly “membership”-oriented identities, therefore, are caught between two equally untenable models of research. On the one hand is the official IRB, which is tied to the hypothesis-testing, experimental clinical model. On the other hand are those ethnographers who, in their zeal to win exemption from irrelevant and time-consuming strictures, appear to be claiming that their research is not—or should not be considered—intrusive at all. Yet the interactive, membership-oriented researchers *are by definition* intrusive—not in the negative sense of the word, to be sure, but they are still deeply involved in the lives and activities of the community members they study, a stance fraught with all sorts of possibilities for “harm.” The dilemma becomes particularly difficult when we attempt to move beyond academic research to the application of research in service to a social agenda. Such action would seem to require intervention and advocacy—or even conflict in some cases—to bear fruit. As such, there is certainly the possibility of harm, but it is difficult to anticipate what form that harm might take. In principle at least, it might be possible to say that because research collaborators are no longer “subjects,” by definition they have as much power as do researchers in shaping the research agenda; they do not need to be warned or protected. But in reality, the researcher is still in a privileged position, at least where actually conducting the research and disseminating its results are concerned. The contemporary researcher probably does not want to retreat to the objective cold of the classic observer, but neither does he or she want to shirk the responsibility for doing everything possible to avoid hurting or embarrassing people who have been trusting partners in the research endeavor. (For another perspective on these matters, see Kemmis & McTaggart, Volume 2, Chapter 10.)

## ■ VALUES AND THE SOCIAL AGENDA

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Observational research, as it has evolved during recent times, is essentially a matter of interpersonal interaction and only rarely is a matter of objective hypothesis testing. As Fluehr-Lobban (2003) suggested, this turn of events makes it more imperative that we be mindful of the relational ethics implied by the informed consent process (pp. 169–172). Ethnographers should not try to exempt themselves from monitoring; we can, in contrast, work toward a less burdensome and more appropriate set of ethical standards. It is important to keep in mind, however, that human action must always be interpreted in situational context and not in terms of universally applicable objective “codes.” Angrosino and Pérez (2000) suggested a method of “proportionate reason” as one way in which to link social research to an ethical framework (pp. 692–695). This position, associated with the philosophical writings of Cahill (1981), Curran (1979), Hoose (1987), and Walter (1984), assesses “the relation between the specific value at stake and the . . . limitations, the harm, or the inconvenience which will inevitably come about in trying to achieve that value” (Gula, 1989, p. 273). In other words, although it is certainly important to weigh the consequences of an action, we must keep in mind that consequences are only one part of the total meaning of an action. Proportionate reason defines what a person is doing in an action (e.g., an ethnographer engaged in an observational context); the person and the action are inseparable. (The opposite, of course, would be the old notion of the ethnographic observer as extrinsic to the action he or she is recording.)

There are three criteria that help us to decide whether a proper relationship exists between the specific value and the other elements of the act (McCormick, 1973; McCormick & Ramsey, 1978). First, *the means used will not cause more harm than necessary to achieve the value*. In traditional moral terms, the ends cannot be said to justify the means. If we take “the value” to refer to the production of some form of ethnography, we must be careful to ensure that the means used (e.g., inserting oneself into a social network, using photographs or other personal records) do not cause disproportionate harm. We might all agree that serving as *comadre* or *compadre* to a child of the community that one is studying is sufficiently proportionate; in contrast, we might well argue about whether becoming the lover of someone in that community (particularly if that sexual liaison is not intended to last beyond the time of the research) does more harm than an ethnographic book, article, or presentation might be worth. Volunteering as a classroom tutor in a program that serves adults with mental retardation whom one is interested in observing and interviewing is probably sufficiently proportionate; in contrast, becoming a bill-paying benefactor to induce cooperation among such adults in a group home would be morally questionable.

The second criterion is that *no less harmful way to protect the value currently exists*. Some might argue that observational research always and inevitably compromises personal privacy, such that no form of research can ethically protect that cherished

value. But most researchers would probably reject such an extreme view and instead take the position that there is real value in disseminating the fruits of ethnographic research so as to increase our knowledge and understanding of cultural diversity, the nature of coping strategies, or any number of currently salient social justice issues. Granted that *all* methods have the potential to harm, we must be sure to choose those that do the *least* amount of harm but that still enable us to come up with the sort of product that will be effective in communicating the valuable message. The strategy of writing ethnographic fiction, for example, might be one way in which to make sure that readers do not know exactly who is being described.

The third criterion is that *the means used to achieve the value will not undermine it*. If one sets out, for example, to use research to promote the dignity of people defined as mentally disabled, one must make sure that the research techniques do not subject those people to ridicule. Videotaping a group of people with mental retardation as they play a game of softball might conceivably result in confirming the popular stereotypes of such people as clumsy or inept—objects of pity (at best) or of scorn (at worst)—rather than as dignified individuals. Videotaping as an adjunct to observational research is itself ethically neutral; its appropriateness must be evaluated in this proportionate context.

McCormick (1973) suggested three modes of knowing whether there is a proportionate reason to carry out a suggested action. First, we know that a proper relation exists between a specific value and all other elements of an act through *experience*, which sometimes amounts to plain common sense. For example, although we may think that it is important to encourage individual expression, we know from experience that doing so in the context of a traditional community, where the individual is typically subordinate to the group, will do real violence to the precepts by which the people we are intent on studying have historically formed themselves into a cohesive society. Experience might suggest that we rethink a decision to collect personal life histories of people in such communities in favor of focusing on the collective reconstruction of remembered common activities or events.

Second, we might know that a proper relationship exists through our own *intuition* that some actions are inherently disproportionate, even if we do not have personal experience of their being so. For example, we should intuitively know that publishing information of a personal nature collected from undocumented migrant workers might mean that such information could be used against them. Our righteous goal of improving the lot of the migrants might well be undermined by giving authorities the ammunition to harass them further. A perception of what *could* happen (the result of intuition) is, of course, different from a perception of what *will* happen (the result of experience), and we are clearly not well served by dreaming up every conceivable disaster. It serves no purpose to allow ourselves to be paralyzed beforehand by overactive guilty consciences. But there is certainly a commonsensical hierarchy of plausibility that occurs in such cases; some things that *could* happen are more likely to come about than are others.

Third, we know through *trial and error*. This is a mode of knowing that would be completely impossible under current institutional ethical guidelines. But the fact is that we do not, and cannot, know all possible elements in any given human social interaction, and the idea that we can predict—and thereby forestall—all harm is naïve in the extreme. An ethical research design would omit (or seek to modify) that which experience and intuition tell us is most likely to do harm. We can then proceed, but only on the understanding that the plan will be modified during the course of the action when it becomes clear what is feasible and desirable in the real-life situation. For those uncomfortable with the indeterminacy of the term “trial and error,” Walter (1984) suggested “rational analysis and argument” (p. 38). By gathering evidence and formulating logical arguments, we try to give reasons to support our choices for certain actions over others. But this way of knowing does indeed involve the possibility of committing errors, perhaps some that may have unexpected harmful consequences. It is nonetheless disingenuous to hold that all possibilities of harm can be anticipated and that any human action, including a research project based on interpersonal interaction, can be made risk free. The moral advantage of the proportionate reasoning strategy is that it encourages researchers to admit to errors once they have occurred, to correct the errors so far as possible, and to move on. The “objective” mode of research ethics, in contrast, encourages researchers to believe that they have eliminated all such problems, and so they are disinclined to own up to problems that crop up and, hence, are less capable of repairing the damage. Those who work with people with developmental disabilities are familiar with the expression “the dignity of risk,” which is used to describe the habilitation of clients for full participation in the community. To deny clients the possibility of making mistakes (by assuming that all risks can be eliminated beforehand and by failing to provide training in reasonable problem-solving techniques) is to deny them one of the fundamental characteristics of responsible adult living. One either lives in a shelter, protected from risk by objectified codes, or lives real life. The ethical paradigm suggested here does nothing more than allow the observational researcher the dignity of risk.

The logic of proportionate reason as a foundation for an ethical practice of social research might seem, at first glance, to slide into subjective relativism. Indeed, the conscience of the individual researcher plays a very large part in determining the morality of a given interaction. But proper proportionalism cannot be reduced to a proposition that an action can mean anything an individual wants it to mean or that ethics is simply a matter of personal soul searching. Rather, the strategy is based on a sense of community; the individual making the ethical decision must ultimately be guided by a kind of “communal discernment” (Gula, 1989, p. 278). When we speak of “experience,” for example, we refer not only to personal experience but also to the “wisdom of the past” embodied in a community’s traditions. As such, it

demands broad consultation to seek the experience and reflection of others in order to prevent the influence of self-interest from biasing perception and judgment. Using proportionalism

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requires more moral consultation with the community than would ever be required if the morality of actions were based on only one aspect . . . apart from its relation to all the . . . features of the action. (Gula, 1989, p. 278)

That being the case, the ideal IRB would not be content with a utilitarian checklist of presumed consequences. Rather, it would constitute a circle of “wise” peers with whom the researcher could discuss and work out the (sometimes conflicting) demands of experience, intuition, and the potential for rational analysis and argument. The essential problem with current ethical codes, from the standpoint of the qualitative observational researcher, is that they set up an arbitrary—and quite unnecessary—adversarial relationship between researchers and the rest of the scholarly community. The framework of proportionate reason implies that ethical research is the product of shared discourse and not of a species of prosecutorial inquisition.

### ■ ELEMENTS IN A SUGGESTED PROGRESSIVE SOCIAL AGENDA

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The abstractions of the proportionate reason framework can be translated into a progressive social agenda to guide the researcher. Progressive politics seeks a just society, although traditional moral philosophy speaks of four different types of justice: (a) commutative justice, which is related to the contractual obligations between individuals involving a strict right and the obligation of restitution (e.g., when one person lends another person a sum of money, the borrower is obliged to return that money according to the terms of the agreement); (b) distributive justice, which is related to the obligation of a government toward its citizens with regard to its regulation of the burdens and benefits of societal life (e.g., a government may tax its citizens but must do so fairly, according to their ability to pay, and must distribute the proceeds according to need); (c) legal justice, which is related to citizens’ obligation toward the government or society in general (e.g., citizens are obligated to pay taxes, serve on juries, and possibly serve in the military, although they reserve the right to engage in conscientious objection—or even civil disobedience—if they deem the demands of the government unjust); and (d) social justice, which is related to the obligation of all people to apply moral principles to the systems and institutions of society (e.g., individuals and groups are urged to take an active interest in necessary social and economic reforms). My own personal vision tends to emphasize the element of social justice, and I suggest three ways in which researchers can work toward the principles embodied in the concept of social justice.

First, the researcher should be directly connected to the poor and marginalized. Helping the latter might well involve intensive study of power elites, but a progressive agenda goes by the boards if the researcher comes to identify with those elites and sees the poor simply as a “target population.” Direct connection necessarily involves becoming a part of the everyday life of a community. The middle-class researcher who *chooses* to live with the poor and otherwise marginalized in our society (or with entire societies

that are poor and marginalized vis-à-vis larger global powers) is, of course, in a very different position compared with residents of such communities who have no choice in the matter. But research in service to a progressive agenda flows from a degree of empathy (not simply “rapport” in the way that term was used by traditional participant observers) that is not available to those who do not even try to maintain such ongoing contact.<sup>2</sup>

Second, the researcher should ask questions and search for answers. This might seem like an obvious thing for a researcher to do, but we are in the habit of asking questions based primarily on our scholarly knowledge of the literature. We move in a more productive direction if we begin to ask questions based on our experience of life among the poor and marginalized rather than on our experience of what others have written or said about them. By the same token, we must avoid the sentimental conclusion that “the people” have all the answers, just as we shun the assumption that “the experts” know what is best for the people. Asking the relevant questions might lead us to look within the community for answers drawing on its own untapped resources, or it might lead us to explore options beyond the community.

Third, the researcher should become an advocate. Advocacy might mean becoming a spokesperson for causes or issues already defined by the community. It also might mean helping the people to discern and articulate issues that may have been inchoate to that point. Advocacy often means engaging in some sort of conflict (either among factions within the community or between the community and the powers-that-be), but it can also mean finding ways in which to achieve consensus in support of an issue that has the potential to unite. In either case, one ends up working *with* the community as opposed to working *for* the community (with the latter implying a more distanced stance).

The overall goal of this process is to empower the community to take charge of its own destiny to whatever extent is practical. The researcher might well retain a personal agenda (e.g., collecting data to complete a dissertation), but his or her main aim is to work with the community to achieve shared goals. Such a philosophy can be difficult to convey to students or other apprentice researchers (e.g., how does it all work out “on the ground?”). To that end, it might be instructive to consider a form of pedagogy that, although not specifically designed for this purpose, certainly serves these ends.

### Pedagogy for Social Justice: Service Learning

The concept of “service learning” was given a boost by the Johnson Foundation/Wingspread report titled *Principles of Good Practice for Combining Service and Learning*. Service learning is more than simply a way in which to incorporate some local field research into social science courses. As a strategy adopted by USF and others in response to the *Principles* report, service learning is the process of integrating volunteer community service combined with active guided reflection into the curriculum to enhance and enrich student learning of course material. It is designed to reinvigorate the spirit of activism and volunteerism that energized campuses during the 1960s but

that waned during subsequent decades. Colleges and universities that accepted this challenge formed a support network (Campus Compact) to develop and promote service learning as a pedagogical strategy. Service learning is now a national movement.

The philosophical antecedent and academic parent of service learning is experiential learning (e.g., cooperative education, internships, field placements), which was based on the direct engagement of the learner in the phenomenon being studied. The critical difference and distinguishing characteristic of service learning is its emphasis on enriching student learning while also revitalizing the community. To that end, service learning involves students in course-relevant activities that address real community needs. Course materials (e.g., textbooks, lectures, discussions, reflection) inform students' service, and the service experience is brought back to the classroom to inform the academic dialogue and the quest for knowledge. This reciprocal process is based on the logical continuity between experience and knowledge.

The pedagogy of service learning reflects research indicating that we retain 60% of what we do, 80% of what we do with active guided reflection, and 90% of what we teach or give to others. The pedagogy is also based on the teaching of information-processing skills rather than on the mere accumulation of information. In a complex society, it is nearly impossible to determine what information will be necessary to solve particular problems. All too often the content that students learn in class is obsolete by the time they obtain their degrees. Service learning advocates promote the importance of "lighting the fire" (i.e., teaching students how to think for themselves) as opposed to "filling the bucket" (i.e., giving students predigested facts and figures). Learning is not a predictable linear process. It may begin at any point during a cycle, and students might have to apply their limited knowledge in a service situation before consciously setting out to gain or comprehend a body of facts related to that situation. The discomfort arising from the lack of knowledge is supposed to encourage further accumulation of facts or the evolutionary development of a personal theory for future application. To ensure that this kind of learning takes place, however, skilled guidance in reflection on the experience must occur. By providing students with the opportunity to have a concrete experience and then assisting them in the intellectual processing of that experience, service learning not only takes advantage of a natural learning cycle but also allows students to provide a meaningful contribution to the community.

It is important to note that the projects that form the basis of the students' experience are generated by agencies or groups in the community. The projects can be either specific one-time efforts (e.g., a Habitat for Humanity home-building project) or longer term initiatives (e.g., the development of an after-school recreation and tutoring program based at an inner-city community center). Given the theme of this chapter, it is significant that all such activities build on the fundamentals of observational research. Student volunteers gradually adopt membership identities in the community and must nurture their skills as observers of unfamiliar interactions so as to carry out the specific mandates of the chosen projects and to act as effective



change agents in the community. In this way, service learning projects affiliated with courses outside the social and behavioral sciences require students to become practitioners of observational research methods, although such an outcome is not a specifically identified goal of the course. Recently at USEF, service learning has been a key feature of a diverse set of courses, including an anthropology seminar on community development, a sociology course on the effects of globalization, an interdisciplinary social science course on farm-worker and other rural issues, a psychology course on responses to the HIV/AIDS epidemic, a social work course on racial and ethnic relations, and a business seminar on workplace communication.

In sum, service learning, which affects the professional educator as well as the novice/student, is more than simply traditional “applied social science,” which often had the character of “doing for” the community. Service learning, which begins with the careful observation of a community on the part of a committed student adopting a membership identity, is active engagement in and with the community in ways that foster the goals of a social justice-oriented progressive political and social agenda.

### Prospects for Observational Research

Although it is certainly true that “forecasting the wax and wane of social science research methods is always uncertain” (Adler & Adler, 1994, p. 389), it is probably safe to say that observation-based research is going to be increasingly committed to what Abu-Lughod (1991) called “the ethnography of the particular” (p. 154). Rather than attempting to describe the composite culture of a group or to analyze the full range of institutions that supposedly constitute the society, the observational ethnographer will be able to provide a rounded account of the lives of particular people, with the focus being on individuals and their ever-changing relationships rather than on the supposedly homogeneous, coherent, patterned, and (particularly in the case of traditional anthropologists) timeless nature of the supposed “group.” Currently the “ethnography of the particular” coexists uneasily with more quantitative and positivistic schools of sociology, anthropology, and social psychology. There is, however, considerable doubt as to how long that link can survive given the very different aims and approaches of the diverging branches of the once epistemologically unified social sciences. It seems likely that observational techniques will find a home in a redefined genre of cultural studies, leaving their positivist colleagues to carry on in a redefined social science discipline.

Observation once implied a notebook and pencil and perhaps a sketch pad and simple camera. The conduct of observational research was revitalized by the introduction of movie cameras and then video recorders. Note taking has been transformed by the advent of laptop computers and software programs that assist in the analysis of narrative data. But as our technological sophistication increases, we face an increasing intellectual dilemma in doing research. On the one hand, we speak the theoretical language of “situatedness,” indeterminacy, and relativism; on the other hand, we rely more and more on technology that suggests the capture of “reality” in ways

that could be said to transcend the individual researcher's relatively limited capacity to interpret. The technology makes it possible for the ethnographer to record and analyze people and events with a degree of particularity that would have been impossible just a decade ago, but it also has the potential to privilege what is captured on the record at the expense of the lived experience as the ethnographer has personally known it. It would be foolish to suggest that, for the sake of consistency, observation-based ethnographers should eschew further traffic with sophisticated recording and analytic technology. But it would be equally foolish to assume that the current strong trend in the direction of individualized particularism can continue without significant modification in the face of technology that has the perceived power to objectify and turn into "data" everything it encounters. Perhaps it will become necessary for us to turn our observational powers on the very process of observation, that is, to understand ourselves not only as psychosocial creatures (which is the current tendency) but also as users of technology. As Postman (1993) pointed out, technological change is never merely additive or subtractive; it is never simply an aid to doing what has always been done. Rather, it is "ecological" in the sense that a change in one aspect of behavior has ramifications for the entire system of which that behavior is a part. Under those circumstances, perhaps the most effective use of observational techniques we can make in the near future will be to discern the ethos of the technology that we can no longer afford to think of as a neutral adjunct to our business-as-usual mentality. It is a technology that itself has the capacity to define our business. We need to turn our observational powers to what happens not only when "we" encounter "them" but also when we do so with a particular kind of totalizing technology.

No technological revolution has been more challenging to the traditions of observational research than the rise of the Internet and with it the increasing prevalence and salience of the "virtual community." Ethnographers have long observed communities that are defined by some sort of geographic "reality," although we have also recognized the importance of social networks that are not place bound. Contemporary virtual communities are an extension of such older "communities of interest," although they depend on computer-mediated communication and are characterized by online interactions. Research needs to be developed to explore the nature of these virtual communities. How are they similar to traditional communities or social networks? How are they different? How does electronic communication make new kinds of community possible? How does it facilitate existing communities? (Regarding questions such as these, see Gabriel, 1998; Hine, 2000; Jones, 1998, 1999; Markham, 1996; Miller & Slater, 2000). As Bird and Barber (2002) noted, "Life on-line is becoming simply another part of life in the twenty-first century. On-line communities may replicate many of the features of other non-place-based communities, but they also make available new possibilities and new kinds of connections" (p. 133).

The increasing salience of electronic media poses some special ethical challenges for the ethnographic observer. It goes without saying that the traditional norms of

informed consent and protection of privacy and confidentiality continue to be important, even though we are observing and otherwise dealing with people we do not see face to face. It is true that the Internet is a kind of public space, but the people who inhabit its virtual terrain are still individuals entitled to enjoy the same rights as are people in more traditional communities. There are as yet no comprehensive guidelines applicable to online research, but a few principles seem to be emerging by consensus. First, research based on a content analysis of a public Web site need not pose an ethical problem, and “it is probably acceptable to quote messages posted on public message boards” (Bird & Barber, 2002, p. 134). But the attribution of such quotes to identifiable correspondents would be a breach of privacy. Second, when observing an online community, the researcher should inform the members of his or her presence and of his or her intentions. The members should be assured that the researcher will not use real names, e-mail addresses, or any other identifying markers in any publication based on the research. Third, many online groups have their own rules for entering and participating. The “virtual” community should be treated with the same respect as if it were a “real” community, and its norms of courtesy should be observed carefully. Some researchers conducting online ethnographies, therefore, have accepted as standard procedure the sharing of drafts of research reports for comments by members of the online community. By allowing members to help decide how their comments will be used, this practice realizes the larger ethical goal (discussed earlier) of turning research “subjects” into truly empowered collaborators.

Bird and Barber (2002) pointed out that “electronic communication is stripped of all but the written word” (p. 134). As such, the ethnographer is at somewhat of a disadvantage given that the traditional cues of gestures, facial expressions, and tones of voice—all of which give nuances of meaning to social behavior—are missing. By the same token, the identity of the person with whom the researcher is communicating can be concealed—or even deliberately falsified—in ways that would not be possible in face-to-face communication. Therefore, it is necessary to develop a critical sense, to evaluate virtual sources carefully, and to avoid making claims of certainty that cannot be backed up by other means.

Whether in the virtual world or the real world, observation-based researchers continue to grapple with the ethical demands of their work. In light of comments in this chapter, it is heartening to learn that a recent report from the Institute of Medicine (IOM) has presented us with the challenge of rethinking the whole notion of research ethics. Ethical regulations, as discussed previously, have tended to ask basically negative questions (e.g., What is misconduct? How can it be prevented?). The IOM report, however, invites us in the near term future to consider the positive (e.g., What is integrity? How do we find out whether we have it? How can we encourage it?). According to Frederick Grinnell, a member of the IOM committee that produced the report, the promotion of researcher integrity has both individual and institutional components, namely “encouraging individuals to be intellectually honest in their

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work and to act responsibly, and encouraging research institutions to provide an environment in which that behavior can thrive” (Grinnell, 2002, p. B15). Grinnell went so far as to claim that qualitative social researchers have a central role to play in this proposed evolution of the structures of research ethics because they are particularly well equipped to conduct studies that would identify and assess the factors that influence integrity in research in both individuals and large social institutions.

## ■ A CLOSING WORD

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It seems clear that the once unquestioned hegemony of positivistic epistemology that encompassed even so fundamentally humanistic a research technique as observation has now been shaken to its roots. One telling indication of the power of that transition—and a challenging indication of things to come—was a comment by the late Stephen Jay Gould, the renowned paleontologist and historian of science, who ruefully admitted,

No faith can be more misleading than an unquestioned personal conviction that the apparent testimony of one’s eyes must provide a purely objective account, scarcely requiring any validation beyond the claim itself. Utterly unbiased observation must rank as a primary myth and shibboleth of science, for we can only see what fits into our mental space, and all description includes interpretation as well as sensory reporting. (1998, p. 72)

## ■ NOTES

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1. In the chapter that appeared in the second edition of the *Handbook*, Pérez and I discussed a number of such studies. One of the authors we cited, James Mieniczakowski, has asked that we clarify some of the remarks we made about his work. Noting his use of “alternative” means of reporting ethnographic data, we linked him with others experimenting with ethnographic writing, including autoethnographers. In so doing, we might have unwittingly left the impression that Mieniczakowski’s work fell into the category of autoethnography. Although that work is not dealt with in this chapter, I feel honor bound to allow Mieniczakowski to present what he believes is a more accurate representation of his work. In a personal communication (May 17, 2004), he noted, “My work unequivocally describes not self-location or autoethnography but a very different form of ethnographic research construction. In fact, . . . my personal experiences or location . . . are not relevant to, or the focus of, my published researches in detoxification therapy.”

2. “Empathy” in this context should be interpreted in a political sense; that is, the researcher takes on a commitment to the community’s agenda. Use of the term in this way should not be taken to imply anything about the totality of the community’s culture or about the ability of the researcher to achieve a capacity to enter totally into the ethos of that community—if such a thing as an enveloping community ethos even exists.

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