

# INSIDER/OUTSIDER TEAM RESEARCH

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## 1. JOINT RESEARCH RELATIONSHIPS BETWEEN OUTSIDE RESEARCHERS AND SETTING MEMBERS

People who are insiders to a setting being studied often have a view of the setting and any findings about it quite different from that of the outside researchers who are conducting the study. These differences, we believe, have significant implications for the quality of knowledge that will be gained from the research, its potential to enhance insiders' practice, and the relationships insiders and outsiders have with each other. Consider the following examples.

Writing in the field of education, Evans, Stubbs, Frechette, Neely, and Warner (1987) criticize social science research for failing to improve educational practice. They say that the research methods typically used rely on the assumption that phenomena under study can be understood apart from the contexts in which they occur and that understandings gained by these methods apply across settings. They claim, however, that practitioners such as teachers experience events in their classrooms as affected considerably by context and do not find context-free generalizations of much use. Instead, teachers need to find immediate solutions to apparently

unrelated sets of everyday problems that present themselves in the classroom.

In the field of community psychology, Chesler (1991, p. 757) notes that "my associates in the Candlelighters Childhood Cancer Foundation say that much of the research on self-help is like popcorn. That is, it looks good, tastes good, it goes down easy, it takes up space, but it is not very nutritious." He goes on to comment that most research on self-help does not answer the questions of self-helpers, despite the fact that researchers care deeply about self-helpers' concerns. He suggests that perhaps this is because conventional research methods do not involve the self-help group members in the research process and do not advance group goals at the same time that they generate scholarly knowledge.

In an autobiographical essay, James Worthy (1993), who had been a director of employee relations and later a vice president at Sears, Roebuck, and Company, describes the research he conducted in collaboration with faculty members from the University of Chicago during the 1940s and 1950s. He identifies the different priorities of the practitioners and university-based researchers as exemplified by the emphasis on publishing results of the studies. He commented:

Only small portions of Sears' research in employee relations and organizational structure were ever published. Unlike studies conducted under university auspices that typically have publication in view, studies conducted . . . by Sears . . . were basically done for administrative purposes, that is to provide officers and executives with information and recommendations helpful in the discharge of their managerial responsibilities. (p. 399)

Although these examples come from quite different fields of study and involve substantially different phenomena, each illustrates the difference in perspectives of those who are "insiders" to a particular setting—the teachers, self-helpers, and Sears' employees—and those who are "outsiders" to the setting, most often social scientists studying it. Whether the setting is a school, a community, a workplace, or some other social system, members and others who are in some way close to the setting will usually have concerns and questions about the setting, and perspectives on it, that are different from those of outside researchers.

In large part, these differences between insiders and outsiders stem from differences in their interests in gaining knowledge about the setting. Insiders need to understand their setting in order to be effective as actors and action takers. Relative to outside researchers, insiders typically see the

setting under study as a source of greater and more enduring consequences in terms of economic security, social affiliation, self-esteem, challenge, and fulfillment. In contrast, outsiders typically experience the setting under study as would visitors; they are there temporarily, usually for a known period of time. Their more personally consequential settings are elsewhere. Usually, however, the outside researchers are responsible for a study of a setting. This entails framing the research, writing up results, and otherwise creating a picture of the setting for identified readers. As a result, they are likely to have much more influence over public interpretations of the settings and events in them than do insiders, the members of the setting.

In this book, we describe an approach to research in which members of settings under study work together, as co-researchers, with outsiders. In this approach, insiders and outsiders jointly examine the setting and jointly author public accounts of life in the setting. Together, they produce the sense made of the setting and knowledge to be gleaned from it. In working jointly with outsiders, insiders contribute directly to public understandings of events in the setting. We refer to this mode of inquiry as insider/outsider team research (or I/O research). In this book, we will describe the creation and use of insider/outsider team research as it occurs across various research projects.

The idea of representing insiders' perspectives in descriptions of a setting is not new. Some traditions, particularly those grounded in an interpretive paradigm and/or relying on fieldwork, have focused on capturing "the native's view" in their research efforts for 50 years or more. For example, in anthropology, ethnomusicology, fieldwork-oriented sociology, and feminist methodologies, researchers customarily have attempted to understand and make public the perspective of insiders in the setting. Sociologists trained in traditions from the University of Chicago have involved members in a wide variety of settings in studying what happens in their settings and how events there are understood (Adler & Adler, 1987). Such researchers long have noted the importance of attending to insiders' subjective meanings as fundamental in describing a setting (Gubrium, 1988). Ethnographers, by definition, have sought to understand and describe setting members' points of view (Schwartzman, 1993). Ethnomusicologists often have become custodians of aboriginal songs that help maintain cultural traditions (Ellis, 1994). Although anthropologists, ethnomusicologists, and fieldwork-oriented sociologists historically have sought to appreciate and convey insiders' experiences and perspectives, seldom have they treated insiders as co-researchers—as members of a team who together frame the questions that guide the study, gather and interpret

data, and create a picture of the setting and participants' experiences in and of it. Feminist researchers have gone beyond this stance. Proponents of this more recent, emerging tradition also often undertake the mutual creation of data, in which participants in the setting under study work with outside researchers to construct the meanings that become data for later interpretation (e.g., Lather, 1988; Oleson, 1994; Reinhartz, 1992).

Traditionally, researchers in many social science fields such as organizational behavior, community psychology, and education have not concerned themselves to any great extent with capturing insiders' perspectives on the setting. (There are some notable exceptions in education, including Becker [1980], Lortie [1975], Noblit [1988], Noblit and Pink [1987], and Wolcott [1973, 1990], who conduct anthropological research in educational settings.) Most researchers in these fields, more positivist than interpretive, have been oriented toward understanding the "impacts" of particular independent variables on critical dependent variables and of assessing patterns common across settings.

Recently, however, more researchers in organizational behavior, community psychology, and education (especially those focusing on teaching and teacher education) are coming to appreciate the importance of understanding research participants' perspectives. For example, Clandinin, Davies, Hogan, and Kennard (1993) described ways that they, as external educational researchers, worked with individual teachers to understand their craft and to help the teachers develop their understanding and practice of it. In community psychology, Kelly (1986, 1994) has documented the benefit of incorporating setting members' viewpoints in analyses. Organizational behavior researchers Elden and Chisholm (1993) demonstrated the value of researchers and setting members working together on various organizational investigations. As these examples illustrate, appreciation of the importance of having external researchers attend to insiders' viewpoints is growing.

As noted, even in fields with long-standing traditions of tapping insiders' perspectives, the insiders rarely join with outside researchers in studying a setting. We believe that one of the best ways to bring insiders' perspectives to a research project is to have them work as team members, as co-inquirers with outside researchers throughout the research process.

When insiders have worked with outside researchers, the focus in written reports often has been on the substantive knowledge gained from these studies (e.g., Brown, 1993; Craddock & Reid, 1993; Engelstad & Gustavsen, 1993). There is a need to focus on the methodological issues specifically involved in such joint work. Our purposes here are, first, to make the case

for the efficacy of partnerships between insiders and outsiders as co-researchers, and second, to consider explicitly, and in detail, the practicalities of doing so.

In this book, we examine what it means in practice for insiders and outsiders to work together as members of a research team. We consider where and when it makes sense to employ insider/outsider research teams and when it does not, and we explore the challenges and dilemmas that arise in conducting research in this fashion. We focus particularly on the use of I/O team research in areas in which the tradition of attending to insider perspectives is not well established—particularly in education, organizational behavior, and community psychology. We draw examples from other fields and subfields with some history of including insiders' perspectives as well as leading-edge work in areas where such collaborations are now emerging.

In the remainder of this chapter, we consider what insiders bring as study team members in terms of their distinctive forms of theorizing. We conclude with brief examples from several fields to show what this mode of inquiry might look like.

### **Theory: Not the Sole Province of Academics**

Many academic researchers, especially those from social science areas that do not have a fieldwork tradition, attempt to formulate general or "nomothetic" theories and models that apply across a broad spectrum of situations (e.g., Hermans, 1992). They design empirical studies to test hypotheses drawn from existing theories (e.g., Kahn, 1986). Theory, however, is not the sole province of academic researchers. As individuals and small groups function in their personal, social, and work lives, they are guided by their own theories. Heider (1958) referred to these as implicit theories, and Elden (1983; Elden & Levin, 1991) and others have called them local theories. Implicit or local theories are sets of heuristically developed rules of practice people use to make sense of the situations they commonly encounter, to weigh action alternatives, and to account for environmental contingencies they observe and experience. Scholarly interest in "social cognition," "cause maps," and "culture" reflects researchers' acknowledgment of the existence of local theory and their attempts to document the formation and functioning of such local theory.

There often are considerable differences between processes and characteristics of theories developed by academics and local theories (cf. Gioia, Thomas, Clark, & Chittipeddi, 1994). For example, Evans and colleagues

(1987) note that practitioners' theories concern individual cases more often than do the cross-individual generalizations developed by academics. Kelley (1992) notes that practitioners' theorizing typically addresses immediate and direct consequences of actions, time spans of minutes to days, and face-to-face interaction among small numbers of people. Elden (1983) suggests that organizational members are likely to attribute workplace problems to organizational arrangements, whereas outside researchers are more likely to attribute them to problematic people and technology.

Moreover, it is not at all evident that the theories academics produce have substantial impact on either insiders or the local theories they hold. Rather, as Barley, Meyer, and Gash (1988) demonstrate with respect to organizational culture, managers' local theories may have more impact on academics' theories than vice versa. In studying differences between academics' and managers' theories about organizational culture, Barley and colleagues note that over time, managers' understandings of this phenomenon came to have a much greater impact on the progress of academic research than did theories developed originally by academics.

Results of studies by Elden (1983), Barley et al. (1988), and Whyte (1982) suggest that not only do individuals', groups', and other setting members' local theories often have more impact on their own behavior than do researchers' more formal and general theories, but also that this is good. For example, Whyte's (1982) work demonstrated that farmers in Latin America who continued to implement their local theories about farming even after supposedly superior methods from the United States had been introduced tended to be much more successful than were farmers who adopted the new methods. This was the case in large part because the environmental conditions surrounding farming in their countries were different from the conditions surrounding farming in the United States. Thus, it is important for outside researchers to take seriously the local theories of those who participate in their studies. The examples we present below incorporate such attention and respect.

#### **Examples of Joint Insider/Outsider Research**

In an example of I/O work drawn from community psychology (Bartunek, Foster-Fishman, & Keys, 1996), two community psychologists founded an advisory board that brought together three groups that historically had been at odds—persons with developmental disabilities, family members of persons with developmental disabilities, and professionals who work with

both groups. The founders developed a model of collaborative advocacy that guided the board in its education and advocacy efforts on behalf of persons with disabilities. The model emphasizes a shared mission, the legitimacy of differences among subgroup goals, and empowering subgroups and individuals.

The founders invited an outside researcher to work with them in studying the advisory board some 2½ years after it began operating. The purpose of the study was to assess how successful the board had been in implementing the founders' collaborative advocacy model. The outside researcher observed advisory board meetings and conducted interviews with board members, and the founders collected and catalogued archival data about the advisory board's development. The outside researcher and the two founders jointly analyzed the interview data the outside researcher had collected. Results indicated that the group by and large had achieved its aims. It was externally successful, the subgroups had maintained their own individual goals, and most individual members felt "empowered."

There were differences among subgroups, however, in how they understood what empowerment meant in the advisory board. Persons with disabilities and family members tended to understand the concept of "empowerment" in much less complex terms than did the professionals. The differences in subgroup understandings of this key concept can result in conflicts among them (cf. Bartunek, Lacey, & Wood, 1992).

An example of I/O work drawn from ethnomusicology (Diamond, 1990; Diamond & Polansky, 1994) took place in Indonesia. A government policy assigns Indonesian "research counterparts" to foreign researchers so that Indonesians gain expertise by participating alongside trained scholars. As an ethnomusicologist, Diamond collaborated with I Wayan Sadra, an Indonesian composer and music critic. Working together, Diamond and Sadra commissioned and produced recordings of new works by Indonesian composers. The composers were allowed control of the recordings, and the outside researchers sought opportunities for international distribution of the recordings. Sadra, an insider, gave the outside researcher contacts, history, and insights into music and language. Diamond, an outsider, introduced Sadra to composers in other parts of Indonesia and shared with him a method for identifying Indonesian composers and their compositions. Together, they were able to select composers from different regions of the country whose work had had an impact on the evolution of experimental music. Many of the compositions selected in the project have since been broadcast in the United States and Canada.

In the field of education, a grassroots movement of teachers is emerging in which teachers join with one another and an outside researcher to study their own practice systematically. The aims of this movement are to both improve teaching practice and contribute to knowledge about teaching. This "teacher-as-researcher" mode of inquiry (Cochran-Smith & Lytle, 1993; Goswami & Stillman, 1987) has developed in opposition to conventional educational research, in which outside academics formulate knowledge and teachers are seen as transmitters, but not producers, of knowledge. In contrast, this movement fosters ways that teachers can produce knowledge based on their classroom experience.

At the heart of the teacher-researcher movement is an action research process. For example, with the help of an outside researcher-facilitator, a small group of teachers agrees to come together regularly during the school year, employing what they call a "collaborative inquiry" approach. The group agrees at the outset to present the products of joint learning to a relevant audience at the end of the year. In their meetings, individual practitioners hold up aspects of their practice to peer inspection; bring the collective resources of the group to bear on problematic aspects of the practice; and undertake, reflect on, and report back results of deliberate experiments in their practice. Formal academic publication of results may or may not be undertaken, but the group does disseminate results to other teachers (M. L. Watt, personal communication, July 14, 1995; Watt, Watt, McKiernan, & Schwartz, in press). For example, in one teacher-research group, Farmbry (1993) explored difficulties she was having as an African American teacher in a primarily African American school because she used the English language in ways different from those used by her students. On the basis of her work in the teacher-research group, she wrote a paper in which she described how she learned to use the difference between her and her students' use of the language to teach her students about complexities of using language for different audiences and to explore how ethnicity and language differences may create barriers between students and teachers.

Practitioners and researchers in the field of organizational behavior also have joined together on several occasions. Among the earliest I/O research efforts in organizational behavior were the Hawthorne studies, a joint undertaking by company researchers and university-based researchers. The studies were initiated by the Western Electric Company in 1927, and the final report of the studies was published in 1939. The studies were inspired and initiated by G. A. Pennock of Western Electric. He brought in Elton Mayo of the Harvard Business School, who with "his staff actively participated in these studies almost from their inception" (Roethlisberger &

Dickson, 1939, p. ix). Over a 12-year period, first the Western Electric researchers and then the Harvard researchers coupled a close interpretive lens with systematic observation and measurement of predefined behaviors to make sense of the effects of working conditions on the performance and morale of workers. The write-up of the history of the studies and the presentation of their cumulative findings was accomplished jointly by W. J. Dickson of Western Electric and F. J. Roethlisberger of Harvard, relative insider and outsider vis-à-vis each other and the setting.

A recent example of I/O work in organizational behavior took place at the Xerox Corporation. The study was undertaken after Xerox management proposed to "outsource" much of the work being done by union members. Peter Lazes, who had been working as a consultant for a quality of work life project at Xerox, suggested to union and management leaders that they create a "cost study team" to study possible internal changes that would save money and jobs. There were substantial risks associated with this approach for both union and management, but both sides accepted the proposal. With Lazes's facilitation, the cost study team worked extensively and creatively. It found a number of ways in which work could be done less expensively at Xerox than through outsourcing. As a consequence, a number of jobs were saved and labor leaders found new ways of working with Xerox managers. Lazes and Xerox personnel who had been involved in the change process then wrote documents, some jointly authored and some separately authored (Lazes & Costanza, 1984; Pace & Argona, 1991; Whyte, Greenwood, & Lazes, 1991), in which they described the work for practitioner and academic audiences. This research thus resulted in immediate practical outcomes and scholarly contributions to the industrial relations literature.

These examples illustrate how varied the purposes may be in I/O work. The examples from community psychology and ethnomusicology served scholarly purposes for the most part. The teacher-researcher and Xerox examples served primarily, though not exclusively, practitioner ends. Nevertheless, all the cases display a close working relationship between outside researchers and setting participants. In each, a deliberate effort was made to incorporate research participants' understandings, local theories, and knowledge about their own situations along with perspectives of the outsider researchers. Most important, some participants served as co-researchers, that is, as members of the team designing and carrying out the research.

We undertook to write this monograph in recognition of the power and propriety of this way of working. We believe that the deliberate and extensive harnessing of multiple, diverse perspectives to the task of inquir-

ing and making sense of complex social phenomena can substantially enhance contributions to knowledge and practice. In these pages, we consider what is involved in creating and managing productive I/O research teams and what some of the dilemmas are in doing so. In Chapter 2, we put I/O work in context, tracing its intellectual roots and establishing what we mean by it. Chapter 3 breaks the research process into stages, illustrating what I/O inquiry entails at each stage. In Chapter 4, we tell an extended story of our own experience conducting two I/O studies in the same setting. Chapter 5 addresses ethical and practical considerations that arise in using I/O teams for research. In the final chapter, we highlight fundamental issues raised in doing joint I/O work and consider implications for other types of inquiry.

## 2. CONCEPTUAL BASES OF INSIDER/OUTSIDER TEAM RESEARCH

In June 1994, Lloyd Ryan, a Canadian educational administrator, sent an Internet message over an action research bulletin board read by people around the world interested in action research. In that message (Ryan, 1994), he presented the following illustration:

I grew up, and still live, in a society and culture shaped by the ocean, primarily. The people live (and lived, more the latter than the former) in small isolated fishing villages along the ocean coastline, remote from urban centres, and their influences . . . .

We have been subject to much scrutiny by university-based sociologists and anthropologists and folklorists, who have developed the "ideomorph" of a pristine (noble savage?) culture characterized by a "true Christian" altruistic, selfless, co-operation. As I grew to awareness of these perceptions, and to self-awareness in relation to them, I became more and more uncomfortable. It was a rather strange experience to be the subject of such scrutiny and to be aware of the nature of the scrutiny. . . . I, too, had studied at university, read sociology and anthropology . . . and, initially, was not a little amused that my culture was the subject of such interest. The discomfort derived, partially, from the fact that we . . . were being perceived in rather romanticized terms, and not without a certain indulgence concerning "our" naïveté about "the real world" which the researchers represented.

Anyway, the CO-OPERATION that these Action Research people saw did not square with my ideomorphs . . . which caused me to doubt my own perceptions. I felt under considerable pressure to accept the romanticized

conception—even though I "knew" that it wasn't accurate or, at least, it didn't "square" with my perceptions of my childhood experiences and memories. (My "native tongue" was an archaic variety of English with numerous modifications, terminology additions, terminology changes, and even grammatical changes. It is spoken, now, very rarely, killed by "modern" communications!) . . . . I puzzled over the "problem."

One day . . . I overheard a resident of one village relate an incident to one of his friends from the neighboring island. Both men were relatively uneducated. (I can usually tell by the terminology utilized. They were using the "old" language.) Thus, where I (with my "education") would simply have used the term "co-operation," with its usual meanings, neither of these men would likely USE the word fluently. Consequently, these men were not "bound" by the meanings associated with that word and had to use words more closely associated with the REAL experiences and the REAL motivations.

The story concerned a family whose house had burned down and how the village had come together to build a new home for the family. (Typically, homes in these villages are not likely to be insured, in the typical fashion, both because that would require hard currency, always in rather short supply, and because insurance companies are understandably reluctant to insure homes where there is not a pressurized water supply . . . .)

It was one phrase by the story-teller that played the Eureka! for me. He said "I had to do it. Next time it might be me." There it was . . . it was not co-operation in the altruistic sense. What researchers had been seeing, blinded by their concept of co-operation, was really an inter-network, consciously and deliberately developed and maintained, of obligations—an insurance scheme, in other words. That notion fitted my memories and allowed me to come to terms with the fractious and quarrelsome people who engendered and reared me in my isolated village. But more. If the family had not been "given" a house, the family would have had to move away from the island, for economic reasons. One less family would mean fewer children in the village school, fewer customers for the village merchant, fewer people overall to ensure that the next unfortunate family were cared for, less reason for the government to keep the school open . . . and less justification for keeping the nurse and clinic on the island.

Thus, it was necessary to give the family a house if the village were to survive. In other words, at root, the "selfless act of cooperation" that the researchers and the newsman saw, and as perceived by the anthropologist, was, in reality, in fact, an act of selfishness, or at least of self-preservation. Maybe the word selfishness is too strong . . . but, it explains my memories much better than the explanations of the researchers.

This is a fascinating story, one that could be discussed from multiple perspectives. We will use it to flesh out in more detail the distinction

between insiders and outsiders to a setting under study. The villagers are clearly "insiders"—people carrying out the activity of helping to rebuild one another's houses. The anthropologists (and perhaps newscasters) are clearly outsiders. They show up from time to time and "explain" the behavior of the villagers.

Beyond these parties, Ryan himself is in a unique position. In relation to the anthropologists, he is an insider, having been reared in the village. In relation to the villagers, he is an outsider, having been to a university and learned the language of the outside society and of science. As a relative insider, he is aware that the outside researchers have misunderstood the villagers' motivations for their actions, but as a relative outsider, he cannot quite put his finger on the precise mistake in the researchers' misunderstandings of villagers' motivations. He no longer tacitly and fully appreciates villagers' linguistic and conceptual categories, although he understands them once they are invoked by the villagers, something beyond the grasp of the anthropologists.

The situation captured in this example of the villagers, Ryan, and the anthropologists conveys differences among the various parties in their psychological involvement and physical proximity to the setting and phenomenon under study. It also illustrates that the terms insider and outsider can be used to indicate the relation among individuals inquiring together—that is, one can speak of an actor as relatively more or less inside than another actor vis-à-vis a particular setting under study. Ryan is an outsider relative to villagers and an insider relative to other anthropologists. Finally, as we will consider in more depth later, the example points out that we are using the terms insider and outsider to capture actors' perspectives on a setting rather than merely to indicate their formal roles in those settings.

Insiders—the villagers in this example—are those individuals whose personally relevant social world is under study. As such, they do not usually engage in knowledge seeking for its own sake (cf. Van Maanen, 1988, chap. 6). Instead, through the very act of coping, a stock of local knowledge accrues to well-functioning actors that serves them as they act and is altered and refined over time in all but the most stable of social worlds. We may characterize the acquisition of local theory that emerges from their acting (Elden, 1983) as "inquiry from the inside" (Evered & Louis, 1981).

In contrast, outsiders—the anthropologists in this example—are particularly concerned with knowledge seeking for its own sake, although they may have an action orientation as well. By whatever systematic approach attends to their scientific discipline, they inquire in order to generate, test,

and/or refine explanations relevant to the class of settings of which the studied setting is but one member. They seek to contribute to the stock of general knowledge (cf. Hermans, 1992) in a manner that can be characterized as "inquiry from the outside" (Evered & Louis, 1981). Their own personally relevant social worlds are not the ones presently under scientifically disciplined scrutiny. Thus, the relative primacy of action and inquiry differs between parties, as do the rules and products of inquiry employed by insiders and outsiders. Both inquire, however, and both do so in ways that address their goals.

It is this observation that leads us to suggest that by capturing, conveying, and otherwise linking the perspectives and products of inquiry of both insider and outsider, a more robust picture can be produced of any particular phenomenon and setting under study. Before proceeding to a description of how this might be accomplished, some tracing of the intellectual foundations and cognitive bases of I/O team research is warranted.

### Intellectual Foundations of I/O Team Research

Although distinctions between insiders and outsiders have been drawn in sociology and other fields, different meanings have been given to them by different authors.

#### SOCIOLOGICAL ROOTS

Within a sociological tradition, Merton (1972) and Schutz (1964) have distinguished outsiders, as objective scientists, from insiders, as people making subjective sense of their own experience. Differences in their use of the terms are crucial to our own formulation. Schutz (1964, p. 92) contrasted insiders and outsiders in the following terms:

Any phenomenon of the social world has a different aspect for the sociologist and for the man [*sic*] who acts and thinks within it. The sociologist . . . is the disinterested scientific onlooker of the social world. He . . . intentionally refrains from participating in the network of plans, means-and-ends relations, motives and chances, hopes and fears, which the actor within the social world uses for interpreting his experiences of it; as a scientist he tries to observe, describe, and classify the social world as clearly as possible in well-ordered terms in accordance with . . . scientific ideals. . . . The actor within the social world, however, experiences it primarily as a field of his actual and possible acts and only secondarily as an object of his thinking. . . . He organizes (his) knowledge not in terms of a scientific system but in terms of relevance to his actions.

Although subscribing to approximately the same definitions of the terms, Merton (1972) focused attention on practical implications of each standpoint and ventured into the realm of the political. He expressed concern about potential biases associated with insiders' perspectives. He described insiders as people who, because of their personal experience, sometimes understand themselves or are understood by others as having a kind of monopolistic access to particular types of knowledge. For example, people of a particular race or gender may see themselves or be seen by others as the only ones who can understand that experience. Merton argued that an approach that privileges the questions and answers of insiders is ethnocentric; it assumes that social position coincides with individual perspectives and in turn suggests (erroneously) that all insiders to a particular context think basically in the same way.

Merton further noted that social scientists sometimes have argued that outsiders are the only ones who can truly understand an insider group. In contrast, he argued that simply being an outsider does not guarantee emancipation from the myths of a collectivity. He optimistically believed, however, that training as a social scientist inculcated sufficient detachment that one could be expected to know how to assemble and assess evidence without regard to its implications for one's own group. Thus, in this sense his use of the insider/outsider distinction has political overtones.

Our own use of the distinction primarily follows that of Schutz. At the same time, we share with Merton a concern that an approach to inquiry that embraces only one perspective is potentially ethnocentric. We do not believe, however, that social science training alone prepares outside researchers to be more able than their insider counterparts to surmount their own situated perspectives.

#### ORGANIZATIONAL SCIENCE ROOTS

Building on Schutz's work, Evered and Louis (1981) contrasted modes of inquiry that one might employ according to the inquirer's physical and psychological distance from or connectedness to the phenomenon under study. They suggested that in "inquiry from the inside," the researcher is immersed in a setting and learns through being in the role of an actor in the real situation under study. This mode of inquiry is grounded in the epistemological assumption that knowledge comes from human experience and derives from an interpretive paradigm: By "being there," the actor comes to know. By contrast, in "inquiry from the outside," the researcher remains

a detached onlooker, a nonparticipant in the social world under study. Evered and Louis likened inquiry from the outside to traditional logical positivism. The outside researcher employs a priori categories to gather factual data, meanings generated are context-free, and validation is achieved through measurement and logic. Evered and Louis further suggested that inquiry from the inside (versus inquiry from the outside) generates knowledge characterized as particular (versus universal) and idiographic (versus nomothetic), and thus was more likely to contribute to praxis or local theory than to general theory.

In 1992, Louis and Bartunek updated the Evered and Louis (1981) formulation. Rather than addressing differences in ways that insiders and outsiders working alone inquire, we focused on how insiders and outsiders might inquire jointly and how they might work together on a study. During the decade between the appearance of the Evered and Louis article and the publication of the Louis and Bartunek article, a small revolution had occurred in the organizational sciences and other social sciences not oriented toward fieldwork. Paradigmatic developments had taken place in which interpretive approaches came to be seen as legitimate alternatives and supplements to traditional logical positivist inquiry. Furthermore, by the early 1990s it was clear that outsider inquiry no longer necessarily meant purely objectivist work.

Our approach emphasizes both the connection of each researcher on the team to the setting in *absolute* terms—to what extent is a researcher an insider or an outsider?—and the connection to the setting *relative* to other members of the research team. Inside and outside researchers bring different perspectives vis-à-vis the research setting that may or may not be reflected in the formal roles they hold relative to the setting. Typically, but not always, the insider(s) will have a role as a long-term member of the setting when not involved in the study, whereas the outsider(s) will not. Typically, but not always, the outsider(s) will have a role that encompasses research activities of some type when not involved in the study, whereas the insider(s) will not. The outsider is more likely than the insider to have received formal training in social science research methods. By definition, the outsider is more detached from the research setting than is the insider. The outsider also is more concerned than the insider with uncovering generalizable knowledge; the insider is more concerned with the particular situation and with developing knowledge for direct practical use. What is the status of thinking about I/O work in other fields where it is emerging?

**CURRENT FORMULATIONS  
WITHIN COMMUNITY PSYCHOLOGY**

Kelly (1986, 1994; Kingry-Westergaard & Kelly, 1990) has been particularly involved in what we refer to as insider/outsider team research within community psychology. He describes what he calls an ecological approach to research. By this, he means that constructs tested in research studies are developed from and by the community—the insiders themselves (cf. Kelly, 1986). As Kingry-Westergaard and Kelly note (1990, p. 29):

Under the ecological approach, the style of work is collaborative among the participants. The process of collaborative work involves both the researchers and the other participants defining a working relationship for the integration of research and practice. . . . [It] reaffirms that research hypotheses are derived from the collaboration of the participants in the context of their working relationship. This working relationship focuses on a shared understanding of the operation of social structures, roles, and norms as they occur in given contexts. The assumed benefit of the collaborative style is that the discovery of information about the structures, roles, and norms expressed in context will enhance the authenticity, the validity, and, therefore, the usefulness of the research.

The collaborative relationship becomes a social structure by which the processes of discovery and understanding can take place. The observer (researcher) and the observed (participants), in this relationship, then create together a shared agenda to discover and to understand community contexts.

**CURRENT FORMULATIONS WITHIN  
THE TEACHER-RESEARCHER APPROACH**

The teacher-as-researcher movement involves insiders and outsiders as co-researchers. The foundations of this movement differ from those underlying the types of joint work we have described to this point. For example, Cochran-Smith and Lytle (1993) argue that apparent joint research in education is typically authored solely by university researchers, is intended for academic audiences, and makes invisible teachers' roles in the generation of knowledge about teaching and learning in classrooms. In contrast, in the teacher-researcher movement, teachers are involved in the generation of knowledge about their own activities. This movement is

based on the notion that knowledge for teaching is "inside/outside," a juxtaposition intended to call attention to teachers as knowers and to the complex and distinctly nonlinear relationships of knowledge and teaching as they are

embedded in the contexts and the relations of power that structure the daily work of teachers and learners in both the school and the university. (Cochran-Smith & Lytle, 1993, p. xi)

In this approach, outside researchers facilitate the learning of inquiry skills by insiders and serve as resources as insiders become reflective practitioners. There is a clear expectation, contrary to Merton's view (1972), that teachers can understand their own experiences better than can outside researchers.

**Cognitive Bases of Joint I/O Team Research**

We have indicated conceptual foundations for the I/O approach in several disciplines, but we have yet to consider the cognitive mechanisms that enable I/O teams to make valuable research contributions. We now consider two of these mechanisms: differences in interpretive frames resulting from different experience histories and the marginal stance created by putting together these different frames.

**INTERPRETIVE FRAMES AND EXPERIENCE HISTORIES**

Weick (1989) makes the point quite persuasively that greater heterogeneity among conjectures or "thought trials" supports more robust theorizing. He further notes that teams of researchers are more likely to generate a greater number of diverse conjectures than are researchers working alone. We have observed and suggest to readers that research teams composed for diversity along the I/O continuum are likely to generate more diverse conjectures, or "thought trials"—to cover more interpretive as well as observational ground—than are research teams whose members are similar in their physical and psychological connections to the organizational setting under study. Along similar lines, Northcraft and Neale have observed that "successful scientific contribution results when collaborations optimize skill diversity" (1993, p. 205) and that "successful collaboration is based on a core of congruency and a healthy accompaniment of complementary dissimilarity" (p. 212).

Parties to a study come with unique experience histories, including their education, socialization, career paths, and previous involvement in the specific setting under study. In cases in which some parties are absolute insiders and some are absolute outsiders, we can expect greater diversity in the set of experience histories represented among the research team. One's experience history in turn helps shape the interpretive frames, the

cognitive schemata (perspectives, in other terms) that team members bring to the tasks of perceiving, enacting, interpreting, and otherwise making sense of their worlds (Frost, Moore, Louis, Lundberg, & Martin, 1991). The more diverse the experience histories of the individuals composing a research team, especially in terms of their relationship to the setting, the more diverse should be their perspectives on and potential interpretations of any particular observed event there.

#### LEVERAGING RELATIVE CONNECTEDNESS AMONG INQUIRERS INTO A MARGINAL STANCE

I/O team inquiry makes sense as well because of the ways that knowledge gains accrue to it by virtue of approximating a marginal stance. Specifically, a marginal perspective is created at the intersection of the contrasting perspectives represented by insider and outsider. Neither party need be a marginal member of her respective setting; rather, as each engages with the relative foreigner who is her partner in the venture, that party's own world is made to some extent more foreign in her own eyes. The native's usually tacit knowledge is thus made accessible through questions reflected in the outsider's questioning looks. This is not unlike the situation in which newcomers' naive questions raise to consciousness the tacit knowledge that persons experienced in a setting act on but seldom think of (Louis, 1980, 1990; Sutton & Louis, 1987).

That insiders and outsiders differ in their psychological and physical proximity to the setting studied sometimes means that the insider is straightforwardly inside the system and the outsider outside it. Other combinations also are possible. For example, Mirvis and Louis (1985) describe a researcher/consultant who had worked with a manufacturing firm periodically over an 8-year period. In this joint inquiry, the researcher/consultant enlisted the aid of a colleague in making sense of his experience and his observations of events in the firm. By design, the colleague had never set foot in the company. In this collaboration, the researcher/consultant was the (relative) insider, whereas his colleague was the (relative) outsider. The insider told the outsider the story of the firm, changes that occurred there, and his responses to events and key actors. The outsider served a clinical role, encouraging the insider to explore the relevance of his personal background and reactions to his experience in the firm. Their relative proximity to the setting—the difference in their connectedness (though neither of them was a regular member or employee of the firm)—created a marginal stance. The researcher/consultant was pulled

away from his intense connectedness to the setting through his conversations with the outsider. Similarly, the outsider was made less of a stranger as the insider involved her in looking at his experience. Together, their temporarily altered perspectives approximated the experience of being marginal, without leaving either party at the margin in the long term. This illustration also suggests the wide divergence in what is meant by relative connectedness to a setting.

#### Action Orientation Within I/O Research

Some I/O research teams are concerned primarily with producing contributions to scientific knowledge. Other teams are concerned primarily with informing and enhancing practice in the setting under study. Concern with taking action is fundamental to the use of I/O teams in the action research tradition.

Since its inception in the 1940s (Collier, 1945; Lewin, 1946), action research has referred to the use of scientific approaches to study important organizational or social problems in concert with the people who experience these problems (Rapoport, 1970). Efforts are designed to produce new knowledge that contributes both to practical solutions to immediate problems and to general knowledge (Elden & Chisholm, 1993).

In recent years, several variants of action research have emerged, including participatory action research (PAR) (Whyte, 1991), participatory research (Park, Brydon-Miller, Hall, & Jackson, 1993), action science (Argyris, Putnam, & Smith, 1985), and action inquiry (Torbert, 1991). Because both PAR and participatory research have been used in a variety of social science disciplines, we will provide examples of them in this book. Both emphasize practical contributions prior to scholarly ends and involve research participants in inquiry about their settings. They differ in attention to political issues.

PAR has been described by Deshler and Ewert (1995) as a process of systematic inquiry in which those experiencing a problematic situation in a community or workplace participate jointly with trained researchers in deciding the focus of knowledge generation, in collecting and analyzing information, and in taking action to manage, improve, or solve their problem situation. The Lazes and Costanza (1984) study is an example of this type of approach, as are Levin's (1993) use of PAR to create social networks that support regional economic development in Norway and Engelstad and Gustavsen's (1993) use of networks to implement a nationwide PAR-based Swedish reform effort.

In contrast, Deshler and Ewert (1995) described participatory research as

a process of combining education, research, and collective action on the part of oppressed groups working with popular educators and community organizers. The knowledge that is generated is intended to help solve practical problems within a community and, ultimately, contribute to a fairer and more just society. Its primary purpose is to encourage the poor and oppressed and those who work with them to generate and control their own knowledge. . . . This tradition emphasizes full and active participation of powerless people, and a stress on ideological, political, and economic dimensions.

Speaking from the perspective of participatory research, Cancian and Armstead (1992, p. 1429) comment that PAR gives "little attention to power and empowerment, or consciousness raising and education, and the action component of the projects is coordinated with management and does not directly challenge the existing power structure. However, we believe such issues are central to participatory research." Examples of participatory research projects include an organizational intervention aimed at helping farmers in India deal with problems in their villages (Brown, 1985) and an educational intervention aimed at assisting developmentally disabled adults with the creation of musical theater productions (Lynd, 1992).

As these varied research traditions indicate, I/O team research can take a number of orientations. These may range in the extreme from purely scholarly aims to an exclusive action focus on behalf of the poor and oppressed. When we say that outside researchers and insider participants work together throughout the research process, what the "throughout" means in practice depends in part on the orientation of the research.

### Characteristics of I/O Team Research

From this look at the foundations of I/O team research, we can identify several distinguishing features of this mode of inquiry. A research effort constitutes an example of I/O teamwork to the extent that

1. a research team is responsible for the study;
2. the research team is composed of people who differ in their physical and psychological connectedness to the research setting and focal questions being examined;
3. insider members of the research team contribute beyond serving merely as sources of data—they work jointly with the outside researcher in designing the research, collection, and analysis of data; interpreting results; and crafting the story presented about the setting; and

4. insider and outsider members of the team share authority for decisions about the content of the story told about the phenomena/setting under study.

Although enhanced practice or systems change is not formally included as a defining characteristic of I/O work, it is a feature of many forms of joint work such as action research and its variants. Even when the primary focus is scholarly, some practical effects on insiders can be expected as by-products of joint I/O inquiry within a setting.

As we noted earlier, although some social science disciplines have a tradition of capturing participants' perspectives, these approaches traditionally have not focused on involving insiders throughout the various stages of a research project. Joint work throughout the stages of research distinguishes I/O research from, for example, much ethnographic work. In most participant observation and ethnographic studies, researchers make use of key informants or guides. Typically, informants are there to respond to researchers' requests but do not act as co-researchers; that is, informants do not see early drafts, let alone participate in writing them. In contrast, when I/O teams are used, the involvement of both insiders and outsiders is at least consultative, and often highly participative, throughout the project.

### 3. CONDUCTING JOINT INSIDER/OUTSIDER RESEARCH

In *The Cornell Chronicle*, an in-house publication of Cornell University, Costello (1994) recently published an article on the work on William Foote Whyte. The article refers in part to the best-selling monograph in the history of sociology, Whyte's *Street Corner Society*, a book about the North End of Boston in the 1930s. The article provides a glimpse into aspects of the study relevant to insider/outsider team research.

In 1936 . . . William Foote Whyte began working in the slum district of the North End of Boston. . . . "When I began the project in Boston, the goal of my research was to understand the social structure and patterns in relation to the economic problems of a depressed urban area," Whyte explained. But as he began working with gang leader Ernest Pecci, who served as Whyte's key contact and informant, Whyte found himself discussing his work and ideas with Pecci. . . . At Pecci's suggestion, Whyte . . . took on an assistant, Angelo