Critical theory, qualitative methods and the non-profit and voluntary sector: an introduction to the special issue

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Introduction

Over recent years, there have been moves to take what scholars have labelled a more 'critical' approach to studies of nonprofit organisations, philanthropy and giving behaviours, and the wider voluntary sector (e.g. Eikenberry, Mirabella and Sandberg, 2019; Coule, Dodge and Eikenberry, 2020; Mirabella, Coule and Eikenberry, forthcoming). This 'critical turn' has come from a view of the subject area as failing to examine political, systemic, and structural issues that may be shaping organisations and behaviours: instead, it tries to 'reveal the most profoundly buried structures' (Bourdieu, 1996: 1) of the nonprofit world.

By taking a critical approach, and drawing on feminist, queer, post-colonial, or postmodern theories, we can identify sources of discrimination and injustice in the sector and identify ways of tackling them. Practically, these are messages that the nonprofit sector – due to crises in safeguarding revealed by the Oxfam Haiti abuse scandal, or challenges to the lack of representation of people of colour in nonprofit leadership roles – is increasingly aware of and indicate some increased willingness to act on. At a time of interlocking social crises – of welfare, democracy, inequality, and more – theory can move from aloof observer to engaged friend (Law, 2015), helping us understand how what may be happening in a voluntary organisation today links to wider historical trends and social structures (Mills, 1959).

At the heart of much of this shift towards critical approaches has been a wider and greater belief in the value of qualitative research. Ontologically positioned to help reveal the socially constructed nature of social relations, and epistemologically critically realist or deploying interpretive ways of knowing, qualitative methods provide researchers with the tools to better reveal the 'verstehen' of people's experiences and practices and make direct links between action occurring within and outside nonprofits. Sometimes unhelpfully seen as a challenge to hegemonic academic ideas, especially in certain disciplines, such as public administration, social work, and business, where nonprofit studies are generally located, applications of qualitative methodology supported by critical theory are used by some to pay attention to the everyday realities behind statistical relationships between quantitative variables (Alasuutari, 2010). Some however view qualitative methods as merely different methodological tools that serve to answer different research questions.

Fundamentally, critical approaches argue that if we *know* differently about society and its structures, then we are more likely to *do* differently (Eikenberry, Mirabella and Sandberg, 2019). Despite this, and as revealed by multiple panels at leading nonprofit research conferences, doctoral candidates and newer researchers in the United States (but sometimes elsewhere as well)have been frustrated by the lack of support for qualitative work in their disciplines, and that the value of this work gets overlooked. This is despite some of the most highly recognised scholarship in the field in recent years utilising both qualitative methods and critical theory, such as Eliasoph's (2011) ethnography of volunteering and Krause's (2014) interview-based exploration of aid agencies' logics of practice. While the environment for critical and qualitative work in Europe is generally seen to be much better, there still remains an esteem problem among policy makers and practitioners between supposedly 'hard' and 'soft' approaches to research, and within universities regarding privileging science, technology and maths disciplines above social sciences.

Further, while all researchers should be reflexive (Dean, 2017) qualitative studies are generally better at providing researchers with scope for reflexive work examining issues of positionality within data collection and analysis. The intimacy and embedded nature of qualitative work (Khan, 2011) creates ethical quandaries and dilemmas for researchers which can themselves be explored and solutions realised through applications of critical theoretical frameworks. Finally, qualitative methods frequently offer better opportunities for non-hierarchical research relations, including participant and community-led research approaches, meaning we shift from 'research on' to 'research with' relationships. Such principles underpin efforts to decolonise research methods (Chilisa, 2019; Smith, 2013) and to employ accessible methods (Gauntlett, 2007) that ensure all people can take part in research projects. In this special issue we are pleased to present seven articles that use critical theory and qualitative methods to better understand the nonprofit world.

Critical theory in nonprofit and voluntary sector studies

If critical theory, as the commentator Stuart Jeffries (2016: 21) puts it, is designed to do anything, it is meant to challenge the official versions of history and intellectual endeavour. Most aligned with the Frankfurt School, but also drawing on diverse theoretical resources, from variants of Marxism and postmodernism, and by various social/intellectual movements such as feminism, queer studies, anarchism and social ecology (Coule, Dodge and Eikenberry, 2020), critical theory focuses on the reflective assessment and critique of society and culture in order to reveal and challenge power structures to reveal and overturn oppression. Critical theory in its very essence also seeks to make links between specifics and larger issues. Social structures like capitalism, gender, race, sexuality, and more, play out in the inequality (e.g Eliasoph, 2013), racial discrimination (e.g. Lingayah, Wrixon and Hulbert, 2020), and gendered violence (e.g. Beaton, LePere-Schloop and Smith, 2021) seen in the sector. It is sometimes forgotten that the nonprofit sector is not some abstract entity, operating on its own rules, away from 'the rest' of life: dominant themes and narratives affect what happens in nonprofits: who gets asked to or expected to volunteer, which organisations ae successful at lobbying, how people experience the role of fundraiser – all are impacted by wider social issues, currents, and inequalities, and theory gives us a common language to explain these. Critical theory, because it exists in a state across disciplines, is also well-located to benefit nonprofit and voluntary sector studies in that our subject similarly crosses disciplinary boundaries in how it is studied. With social policy, public administration, business and management, economics, sociology, and political science (among many others) all laying claim to be a way to understand nonprofit sectors and voluntary action, there is a need to use language and ideas that cross boundaries.

One role of the nonprofit and voluntary sector is to challenge (unequal) existing power structures, campaign for better societies and social justice, but with that comes a responsibility to undertake inward critique when sector behaviours and practices have become unthinking orthodoxies, that may be doing more damage than good. We, and the authors in this volume, believe critical theory is a vital tool in doing that work.

Critical theory has perhaps never been more important and has never been as much under attack. Multiple fronts have been opened up, part of a wider 'culture war' that sees theoretical ideas that seek to challenge doxa and hegemony as deviant and treasonous. In Poland and Hungary, gender studies has been a casualty of a new, avowedly 'illiberal' nationalistic politics, labelled a 'pseudoscience' by Government ministers (Grzebalska and Pető, 2018). Longstanding theories about gender and identity in the UK have been suddenly transformed by critics into a 'gender ideology' that has brainwashed a generation of young people. Critical Race Theory, and its examination of institutional racism and race's position as a social construct, has been weaponised by right-wing politicians in the US in the wake of the Black Lives Matter movement, and misrepresented as a core

ideology undercutting American history and society. The phrase 'Cultural Marxism' has come to be used as a catch-all label on social media, to undercut, devalue, or ignore any generally social democratic idea or individual. In a way, the very idea of using social scientific theories by some people to make sense of themselves and their world, in ways that other people disagree with politically or ideologically, is viewed or has been framed by others as some sort of conspiracist thinking. The fact that critical theory emerges from a largely Jewish set of academics and scholars in the Frankfurt School, and the anti-Semitic essence of much conspiracist thinking, should not go un-noted. It's easier to believe that one's opponents are victims to a predatory theory, rather than accept society is changing, values are altering, and you might be wrong about something. While some individuals may develop genuine concern about such approaches, evidence suggests that much of this noise and faux-concern emanates from media framing of threats to existing values – if so, future attacks on theoretical ideas seem a solid (if unwelcome) tactic we will see more of.

Qualitative methods in nonprofit and voluntary sector studies

Nonprofit and voluntary sector scholarship is limited in its empirical analysis of the sector through a critical lens. Qualitative approaches provide room for such in depth analyses from individual experiences to sector-wide structures. Critical methodologies acknowledge and account for the power differences among research participants and the power structures embedded in the research process. Hallmarks of empirical analyses engaging with critical methodologies are participatory data collection and reflexivity in the role of the researcher in each stage of the research process. As shown in the articles in this special issue, close interaction between researcher and the researched make room for research participants to engage with the process rather than simply serve as sources of data. For example, trauma-informed research design is reflexive in that it acknowledges how the researcher and the study itself can potentially cause harm to the participant during and after data collection (Hardner and Wolf, this issue). Feminist analysis recognizes gendered differences in the study setting, targets feminist lines of inquiry, and allows participants to influence the research design itself, for instance in fundraising (Dale and Breeze, this issue); with employees of nonprofit organisations (Hardner and Wolf, this issue); within school-based volunteer programs (Lau, this issue); and in third sector-government partnerships (Sanders, this issue). Critical researchers aim for the structure of the relationship between researcher and the researched to be that of shared power or collectivist in nature. Ethnographic tools prove valuable in this space. Extended time and repeated interactions with the setting and a close, small group of individuals offers greater opportunity to build 'thicker' descriptive data and greater depth to interpretations of behaviours and societal understandings.

In this collection of articles, the unit of analysis ranges from individuals to groups and to organisations. Individuals in these studies were identified as girls, women, indigenous people, nonprofit leaders, the elite, and volunteers. The interpretation of this data collected from individuals is used to make sense of the nonprofit sector at the micro (individual), meso (organization), and macro levels (sector). Qualitative analysis allows for movement between units and levels of analyses by capturing the interdependencies of institutional influences of the organisation onto individual behaviour and the interrelationship between societal expectations of individual behaviour and the resulting organisational behaviour. These interrelationships are central to critical analyses of nonprofit organisations and make way for structuralist interpretations. In this special issue, such structures are empirically examined through feminist, critical race, decolonial, and neoliberal marketization theories.

The contents of this special issue

This special issue starts with Elizabeth Dale and Beth Breeze's article exploring the gender stereotyping, discrimination, and harassment that occurs in the profession of fundraising. The authors apply a feminist analysis exploring the role of power among individuals within gendered spaces. This feminist approach to research avoids asymmetrical relationships between researcher and researched. Dale and Breeze examine 366 examples of gendered stereotyping pulled from survey data in addition to data from three focus groups. Through counter-storytelling of gendered stereotyping experienced as fundraisers, the authors capture the experiences in this gendered space which challenge a view that women are not interested in leadership roles. Dale and Breeze also argue that fundraising field is gendered which undermines one's professional trajectory.

Kimberly Hardner and Molly Wolf also take a feminist approach in their exploration of a nonprofit organisation that was seeking to implement a 'trauma-informed care' approach to their work. Trauma-informed care recognises that individuals may have experienced trauma in the past, and seeks to embed everyday practices that work to ensure that no one in the organisation is retraumatised, allowing opportunities for healing through collective notions of safety, trustworthiness/transparency, peer support, collaboration, and empowerment. By employing feminist approaches to research methods which prioritise participants' voices and take upmost care to diminish power inequalities between researcher and researched, Hardner and Wolf show how the feminist methodology not only encouraged the use of TIC in the organisation, but also taught the organisation ways of being trauma-informed that were previously unidentified, demonstrating how critical approaches can translate into action, and researchers can work as collaborators focused on improving their research sites, not just collecting data.

Amy Sanders applies a feminist institutionalist lens in her examination of representation and participation in Welsh third sector-government partnerships. The feminist intuitionalist lens frames equalities by how institutions formally and informally frame or constrain them. Sanders applied a critical discourse analysis to semi-structured interviews with policy elites. Critical discourse analysis allowed Sanders to question expectations driven by institutions. She found that equalities representation is restricted to institutional expectations for the third sector as a whole, undermining the legitimacy of expert knowledge on inequalities to inform policymaking. Ultimately, the expectation of a third-sector unified voice risks driving out diverse voices. A feminist institutionalist perspective was engaged to identify sources of discrimination and injustice.

In their exploration of how neoliberal marketization is altering the nature of nonprofit work, Billie Sandberg, Robbie Robichau and Andrew Russo also explore the gendered way in which social structures impact nonprofit managers. Across their sample of interviews, they find that women managers wrestle more with the conflicting discourses of market and mission values and rhetoric, as well as having to deal with socio-cultural expectations around gender. Their article provides us with a framework for understanding the relationship between neoliberalism, marketization and the ways in which the modern nonprofit work environment is structured, showing how neoliberal approaches emphasise developing the ideal (woman) entrepreneurial subject, one who is committed to a narrative of overwork as an aspect of their core identity, and where a healthy work-life balance is almost seen as something with negative implications.

In her article, Emily Lau documents the experience of a group of girls at an English high school, and the ways in which coerced volunteering can be imposed through gendered constructs. Using a feminist ethnography including observations, interviews, and case studies within the high school setting, Lau applies Blackman's concept of crossing borders to engage in constant reflexive work on her role as researcher and the students' roles as the researched. The triangulation of continual observations and interviews with both teachers and students provided a broader picture of the way

volunteering expectations were imposed on the female students. She found that school-based volunteering systematically reproduced societal gendered inequalities and pushes for collective understanding of how inequalities operate among everyday social expectations.

In Katherine Chen's article, she undertakes an organisational ethnography of a micro-school in New York. Making use of Yang's concept of 'scyborgs' - agents who repurpose colonial practices for decolonised, transformative goals - this article showcases interlinked stories that draw on ethnographic research of a liberatory organisation, and Chen's own efforts to practise what she learnt from these sites in other contexts, including her workplace, her child's school and a voluntary association. Chen also makes use of vivid first-person autoethnographic accounts, as she details how her research and experiences intersect with her own personal and professional life. This critical approach to writing challenges much of the hegemonic standards in nonprofit studies and provokes the need for wider reflection on the role of reflexivity and positionality within the research process.

Finally, in their article, Antonio Jimenez-Luque and Melissa Burgess engage decolonial theory to examine how the implementation of nonprofit agendas can mirror colonialism. When decisions about mission and programming are made by elites not representative of the people the organisations serve, they can be misguided and harmful. Nonprofits then replicate social hierarchies based on race and class resulting from colonial times. Jimenez-Luque and Burgess conduct an ethnographic case study of a Native American nonprofit in the Northwestern U.S. using a dataset of observations, artefacts, and interviews of nonprofit leaders and participants. The authors use a 'research with' approach with decolonizing and Indigenous research methodologies. Jimenez-Luque and Burgess find that emotions and emotion regulation can be used to change the dominant-script and then to resist, raise voices, and contribute to social change.

We are hugely grateful to the *Voluntary Sector Review* editorial team, for providing us and the article authors with the space to develop these debates, and especially Daiga Kamerāde, who, as link editor, has guided us through the process of developing and publishing a special issue.

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