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Taking the Action Turn: Lessons from Bringing Participation to Qualitative Research

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This chapter tells the story of our decision to introduce participation as a key feature of a qualitative research project about social change leadership. We analyze the context that influenced our choice to create a 'hybrid' design; discuss the subsequent choices we made about our 'positionality' vis-à-vis research participations and the kind of knowledge we produced; and reflect on the tensions these choices created with respect to control over the research process, its action orientation, and whose voice was represented. Embracing participation enriched the research but also provided hard-earned lessons about the trade-offs of taking the action turn.

This chapter tells the story of our explicit decision to introduce participation as a key feature of a large-scale, multi-year, US-based research project to study social change leadership. We invited those who would have been the 'subjects' of the research to co-inquire about their experience of leadership. Embracing participation opened up and enriched the research in many ways. It also generated tensions and challenges that would have been absent had we followed a more traditional qualitative research path. Given the action turn, more and more qualitative researchers are including elements of action

research in their work, yet this marriage is not straightforward. We provide hard-earned insights about the trade-offs of combining these approaches.

The research took place as part of a foundation-funded recognition program for social change leaders. Our decision to make the research participatory grew out of our position at the center of several competing interests: of participants, ourselves and our research community, and the funder. Choosing to honor each of these relationships led to a hybrid design that combined elements of action research and traditional

interpretivist qualitative research. In this chapter we discuss the origins of the tensions we encountered, how they manifested themselves in the day-to-day life of the project, how we handled them, and their consequences.

This chapter begins by describing the institutional context of the research and the research design we created as a response to that context. We then discuss how that design resulted in choices we made related to 'positionality' (Herr and Anderson, 2005) and to the nature of knowledge that we wanted to produce. We then explore how these choices created tensions with respect to *control* over the research process, the *action* orientation of the research, and whose *voice* is represented – critical issues within the contested terrain of qualitative research paradigms (Guba and Lincoln, 2005), and within conversations around the nature and practice of action research (Gaventa and Cornwall, 2001/2006; Heron and Reason, 2001/2006; Park, 2001/2006).

SETTING THE STAGE: HOW HISTORY AND THE INSTITUTIONAL CONTEXT CREATED COMPETING DEMANDS

Our study grew out of the Research and Documentation component of a national, ongoing program called Leadership for a Changing World (LCW), funded by the Ford Foundation. The goal of the program is to 'recognize, strengthen and support leaders and to highlight the importance of community leadership in improving people's lives' (Leadership for a Changing World, 2006). It recognizes and provides a financial award to individuals and teams in social change organizations.

Program participants have included 165 individuals across 92 social change organizations, recognized in cohorts of 17 to 20 organizations from 2001 to 2005. These award recipients were selected because they demonstrated leadership that is strategic, is sustainable, bridges different groups of people, and gets results. They participate in the program for two years, and engage in various activities, including the research. Recipients represent community-based organizations that effectively address critical social problems with a commitment to social change. Their work spans a broad range of policy domains, including community development, the arts, human rights, the environment, sexual and reproductive health, youth development, and education, among others. They also combine, in differing degrees, at least four types of activities: service delivery, organizing, advocacy and community building (Ospina and Foldy, 2005).

Competing Demands Emerging from Program Context. This context influenced our choices and contributed to three competing demands we faced as researchers. First, in addition to recognizing leadership for social change, the LCW program creators wanted to disseminate the notion that 'leadership comes in many forms and from many different communities' (Leadership for a Changing World, 2006). Therefore, our research was meant to change the way the broad public, as well as public officials and policy-makers, think about leadership. The research was part of an intervention for social change grounded on explicit value commitments (Toulmin, 1996) favoring the poor and disenfranchised, and supportive of social justice approaches. These requirements placed us closer to action research and other 'new paradigm' qualitative approaches that have taken the action turn, rather than to mainstream qualitative research, whether interpretivist or positivist, which assumes value neutrality as the starting point (Guba and Lincoln, 2005).

Second, because we came to this context located within an academic setting, schooled in the conventional demands of social science research, we wanted to influence the academic one as well. Both our school and the leadership field were clearly dominated by positivist orientations where objectivity, validity, and generalizability reign. Moreover, as interpretive qualitative researchers, we were attuned to the standards required by our own professional codes. For these reasons, we wanted to work with both conventional standards of qualitative research and at the same time meet the additional standards demanded by the action turn (Dodge et al., 2005).

Finally, the award recipients brought their own interests and demands. For most of them, engaging in research meant an opportunity to learn more about the issues they were passionate about: how to mitigate the effects of toxic sludge in their rivers, how best to design employee ownership programs, or the economic consequences of passing a living wage bill. While some also had questions about leadership practice and welcomed the opportunity for inquiry into this dimension of their practice, others were disappointed that research resources would not be directly and immediately applied to advance their own particular mission.

Placed at the center of these competing demands – from the funder, academic colleagues and program participants – we developed a hybrid design that, as much as possible, balanced these various interests. In the next section we describe the overall design and the specific choices arising from it.

CHOOSING A HYBRID RESEARCH DESIGN

Since research methods must be 'appropriate to the subject matter and interests at stake' (Toulmin, 1996: 204), our design considered the broader institutional context within which it existed. Our theoretical framework, research focus, methods and research stance reflect our attempt to create a hybrid approach that brought participation to the center of our practice. In turn, this choice had consequences for our positionality as researchers and for the nature of the knowledge we produced.

Theoretical Framework. Dominant, positivist theories hold up a 'heroic' version of leadership that is largely drawn from research in corporate and governmental organizations (Allen, 1990; Fletcher, 2004; Alimo-Metcalfe and Alban-Metcalfe, 2006). In contrast, our work focused on social change organizations and drew on a constructionist approach to leadership (Ospina and Sorenson, 2006), which views leadership as the collective achievement of a group, rather than as the property of an individual (Pfeffer, 1977; Smircich and Morgan, 1982; Hunt, 1984; Tierney, 1987; Drath and Palus, 1994; Meindl, 1995; Pastor, 1998; Drath, 2001). Based on the notion that leadership emerges from the constructions and actions of people in organizations, our main research question was 'In what ways do communities trying to make social change engage in the work of leadership?'

Research Focus. This theoretical understanding had important implications for the focus of the research. If leadership is shared and relational, then research should focus on *the work* of leadership, as evidenced in collective action, rather than the behaviors or characteristics of individual leaders. For us, this meant collecting data from a wide variety of individuals involved in each organization, rather than just the award recipients themselves, and inquiring about how organizational members made sense of and carried out activities to exercise leadership in particular arenas.

Methods. We did this work by creating a multi-modal design with three parallel research methods: narrative inquiry, ethnography and cooperative inquiry. Offering participants an opportunity to choose their degree of involvement (given their limited time to engage in co-research while doing their regular work), we hoped that each participant (or a member of their organization) would agree to participate as co-researcher in at least one method.

The *narrative inquiry* involved site visits and extended interviews with participants and their colleagues focused on their work, in order to learn about aspects of leadership that the organization exemplified. These were summarized in a 'leadership story' for each group. In the *ethnographic inquiry*, ethnographers located near the organization's community worked with selected participants and their colleagues, for about three months, to paint a portrait of particular leadership issues or practices; *cooperative inquiry* groups, made up of six to eight participants,

engaged in cycles of action and reflection to explore a burning question of their practice. We then integrated the fruits of all three streams, weaving together lessons from across methods and cohorts of participants, to develop a deeper understanding of practices involved in social change leadership.

In sum, this multi-modal design gave program participants, in theory, various ways of engaging in the research process. Each method afforded a unique angle from which co-researchers could reflect on their experience and offered opportunities for different degrees of participation. Incorporating a participatory perspective into our qualitative research had important implications for our research practice, in particular our 'positionality' as researchers vis-à-vis research participants.

Our position in relation to the research participants. Viewing action research as a broad concept covering many research practices, Herr and Anderson (2005) use the term 'researcher positionality' to describe the different stances researchers can take toward research participants. They propose a continuum of positions that range from (1) an insider studying her own practice to (6) an outsider working with insiders. Between these extremes, are other positions. From 'the inside' toward 'the outside', these include: (2) insiders in collaboration with other insiders; (3) insiders in collaboration with outsiders; (4) insider/outsider teams working in reciprocal collaboration; and (5) outsiders in collaboration with insiders.

While our understanding of our own positionality was implicit as we moved through the research process, we have used the concept to more fully understand our experience in the research. Our positionality was complicated by the competing demands we faced from the three major interests we wanted to honor. The conventional academic perspective suggested taking the sixth positionality, that of outsiders with a neutral stance controlling the research, but this was inconsistent with our interpretivist approach and with the demands of the program. Many LCW participants preferred the third positionality:

insiders in collaboration with outsiders, so they could use the research to investigate particular questions generated by their work. The foundation's original 'request for proposals' framed the invitation to do research about leadership as outsiders collaborating with insiders, or the fifth positionality. It encouraged outside researchers to draw extensively from participant practice to create new knowledge in the voice of the researcher.

Considering the context, we proposed the stance of co-research, inviting participants to study with us their experience of leadership. Doing so, we shifted the nature and goals of the research component from practice-oriented research (to learn *from* the practice of the LCW program participants) to a participatory research (to learn *with* LCW participants). The foundation welcomed this reframing. We thus aspired to take the fourth positionality Herr and Anderson (2005) describe: an 'insider/outsider reciprocal collaboration', which we felt provided the best response to the competing demands from participants, academics and the funder. However, despite valiant attempts at consistency, our footing has varied – ranging at different stages from 'insiders in collaboration with outsiders' to 'reciprocal collaboration' to 'outsiders in collaboration with insiders' and even 'outsiders working with insiders'. These shifts resulted from our responses to the interests of the various parties and the particular kind of knowledge most useful to each.

We found our positionality shifted most often in response to three specific tensions which we turn to now: *control* over the research process, the *action* orientation of the research, and the *voice* represented in the production of knowledge.

LIVING A HYBRID DESIGN: IMPLICATIONS FOR CONTROL, ACTION AND VOICE

Both action and qualitative researchers must address several difficult issues: who has power over the inquiry, how the research

does or does not support action for change, and whose understandings are reflected in disseminated materials (Fals Borda, 2001/2006; Hall, 2001; Guba and Lincoln, 2005). Like Guba and Lincoln (2005), we acknowledge that these issues of control, action, and voice are interdependent, but we will look at them separately for analytical purposes. Below we provide a conceptual description of each issue, the choices we made to respond to each issue, the advantages and disadvantages of our choices including how they affected our positionality and, at the end of each section, an overall assessment of they way we approached the issue.

Control of the Inquiry

Control relates to the question 'how is knowledge created?' and to the interconnection between knowledge and power. Such issues as 'Who initiates [the research]? Who determines salient questions? … [And] Who determines how data will be collected?' need to be addressed (Guba and Lincoln, 2005: 202). Engaging participants in research – sharing control with them – redefines the knowledge production process and outcomes in ways consistent with the quality standards of action research and its goals of 'participation and democracy' (Reason and Bradbury, 2001/2006).

Our research in practice: Tensions around control. In general, we aspired to generate what Herr and Anderson (2005) label the fourth positionality, 'reciprocal collaboration among members of an insider/outsider team' (p. 31), or what Chataway (1997) refers to as 'mutual inquiry', which implies sharing control equally. Herr and Anderson (2005) acknowledge that in an ideal world, this position represents the most democratic approach. Yet they also state that, because 'the notion of insider and outsider is often a matter of degree' (p. 38), in practice each position offers an equally respectable way of producing actionable knowledge, as long as the implications of one's choices are considered (see

also Reason, 2006; Reason and Bradbury, 2001/2006).

Indeed, in some instances, we have engaged in genuine reciprocal collaborations. However, given the complexity of our institutional context, we did not fully realize this aspiration. As expected, different individuals and leadership teams responded to the invitation to participate in different ways, from full participation and engagement in some cases, to willing collaboration in others, to partial and at times reluctant cooperation in yet others, to non-participation in a few. Given these choices, more often than not, we have been 'outsiders doing research in collaboration with insiders'. To respond to both the participants' interests in social change practice and the broader program's interest in generating new knowledge, we had to make choices about which research activities would prioritize practitioners' needs or academic needs. Importantly, these choices impacted positionality and who would control which streams of research.

For example, in cooperative inquiry, the projects were almost entirely driven by participants and required a significant time commitment from them. They reflected collectively on burning issues from their practice and worked with facilitators over five cycles of action and reflection to refine the question and answer it. The cooperative inquiry groups generated reports of their findings to contribute to knowledge production in the project, sometimes written by participants, sometimes by facilitators, and sometimes by both.

In contrast, participation in the narrative inquiry stream varied, from participants who shaped the inquiry from beginning to end, to those who only provided foci for the interview protocol, suggested interview participants, and gave us feedback on our analysis, then left it to the researchers to implement the rest. Even those quite involved in this stream did not participate in 'cross-site analysis', a piece of the research based in more traditional qualitative research practices that looks for common themes across

organizations. The core research team managed and carried out this process: we identified key themes, carried out coding and analysis, and wrote academic articles, as well as developed a model of social change leadership (Ospina and Foldy, 2005).

Advantages. One of the key advantages of sharing control with participants is that the research process becomes more democratic, a worthwhile aspiration in itself. Given our theoretical, practical and philosophical motivations, we viewed program participants as owners of the experience of leadership rather than holders of attributes worth studying from afar. Therefore we saw the value of working with them to create knowledge, viewing them as insider 'agents' of the research project, rather than as 'objects' to be studied by outsiders.

A related advantage was that democracy also enhanced the quality of the knowledge generated. Given the scant availability of knowledge about leadership produced by applying a constructionist lens, we decided that it made sense to work *with* participants in the research, to share control over the research process so they would be involved with us in defining relevant research questions about leadership, choosing the best ways to carry out the research, and offering different ways to interpret findings. For example, in a summary report of all of the ethnographies we had done to date, we wrote about the power of this type of leadership for constructing social worth where others only saw problems. Because we created space for participants to identify topics of interest to them and propose ways to study them, we were able to learn about the important ways that they discovered and nurtured hidden assets to create positive social change in the most difficult circumstances.

Disadvantages. On the other hand, sharing control required us to spend additional energy doing tasks that, while present in more conventional qualitative research, are relatively bounded. Using participatory research meant ongoing negotiations over who would do what, who would take ownership over what,

and who would make decisions about which aspects of the research.

This challenge was intensified by the specific context of the broader program. New participants arrived every year, triggering anew the trust building process and requiring negotiations around control. Furthermore, the fact that the research was commissioned by a foundation influenced early decisions associated with control. For example, because the research was part of a broader funded intervention, we had to determine the general parameters of the research activities before participants arrived. The foundation's request for proposals required well-structured plans, and once we were recruited, they asked us for even further clarification of activities, schedules and products before the program started. Under these conditions, our original invitation for co-research was interpreted as imposing a rigid research design that was contrary to genuine collaboration and co-production. The first group of participants fought hard during the first program meeting to make it clear that they would not accept a position as unequal partners under a 'discourse' of co-research (Ospina et al., 2004). Given our position in relation to the various program stakeholders, we had to directly address suspicions that we were exploiting participants rather than engaging in a reciprocal relationship that would add value for everyone.

Assessment. We were most successful in sharing control with participants in cooperative inquiry and ethnography, where there was more room for negotiation over the insider/outsider collaboration, and where participants could create and use knowledge that would directly contribute to their work. As for narrative inquiry, while many participants appreciated it, in general they found the overall process and product more removed from the urgencies of their daily work and felt less interested in participating in all of its stages. We had most control over the cross-site narrative analysis, given our interest in producing public knowledge that met academic standards, and participants'

lack of interest in engaging in this type of inquiry.

Though we strived to be egalitarian (Toulmin, 1996), we did not fully achieve it. Ultimately the initiative to do research did not come from participants nor was it organized to primarily help their work. Moreover, the basic structure and methods through which the inquiry was conducted were largely in place before the participants became involved. Also, as a result of the program's broader institutional context, the core team ultimately responsible for the research kept authority over resources designated for research.

Yet there were clear advantages to our hybrid approach. In sharing authority and control over the research agenda we engaged participants more fully, made the process more democratic and developed insights that we would not otherwise have done. Further, we created different kinds of knowledge, some of which has been directly useful to participants' work. In the next section, we explore how well these processes and products helped to create actionable knowledge.

INTEGRATING ACTION AND INQUIRY

Answers to the question of 'Knowledge for what?' bring to the forefront concerns about the extent to which inquiry and action are integrated or separated. In conventional social science research, action happens after the research is finished, by persons external to the inquiry (Ospina and Dodge, 2005). Applied researchers who advocate for 'pragmatic science' (Hodgkinson et al., 2001) may call for collaborating with those interested in future action, but even there, the expectation is that inquiry and action are distinct. In contrast, action is an integral part of the action research process; the *purpose* is to make positive change in the world, by developing local knowledge through participation (Toulmin, 1996; Reason and Bradbury, 2001/2006). This way, the process and products of action research are distinct, even from those

in applied and pragmatic research (Park, 2001/2006). Guba and Lincoln (2005) see a trend in qualitative research as it moves from 'interpretation and Verstehen, or understanding, toward social action' (p. 201). Their description of a 'mandate for social action, *especially action designed and created by and for research participants with the aid and cooperation of researchers*' (p. 202, emphasis added) illustrates how the action turn is bringing qualitative research and action research closer together.

Our Research Practice: Tensions around Action. The relevance research has for action is influenced largely by the kind of knowledge produced. This distinction between 'local' and 'public' knowledge is central here. Local knowledge is narrow and specific and is designed to support action at a particular place and time. Public knowledge consists of conclusions that are transferable to other contexts (Cochran-Smith and Lytle, 1993; Herr and Anderson, 2005).

Participants in our program were most interested in producing local knowledge that would enable them to advance the particular issues that drove their work – such as rights for day laborers or housing for people with HIV/AIDS. This would require a positionality of mutual collaboration. But the funder wanted public knowledge with broad appeal, even if it had no direct consequences for any given participant's work. Academics require a particular subset of public knowledge that is created according to particular rules of rigor, and that generalizes to either a population (positivist research) or a theory (interpretivist research) (Rubin and Rubin, 2005). Conventional researchers tend to choose the more traditional positionality of outsiders working with insiders for this work.

Our goal was to develop both local and public knowledge. We wanted to support the work of participants, find applications to other social change contexts and contribute to the theory of leadership. We believed we could do this by engaging in 'practice-grounded research', that is, research grounded in the perspectives of practitioners – independent of

whether it is led by insiders or outsiders – but aimed at better understanding leadership practice in a way accessible to others outside the inquiry process. For the most part, our multi-method design allowed us to generate local knowledge for action while creating opportunities to build public knowledge, like other action research techniques do (see Roth and Bradbury, Chapter 23 in this volume).

Cooperative inquiries and collaborative ethnographies allowed participants to propose questions of relevance to their work, thus integrating research and action. One of the collaborative ethnographies grew from an agreement between two LCW organizations to document the factors that facilitated and hindered their efforts to engage in collaborative work given their differences – one worked with Latino immigrant workers to protect their rights; the other with a largely white, middle-class base that advanced the rights of gays and lesbians. The final narrative, however, provided insights about leadership and collaboration beyond the particular case.

Narrative inquiry, on the other hand, more directly addressed the need to produce knowledge for external practitioner and academic audiences. In our analysis of narrative transcripts, we searched for patterns across organizations using more conventional qualitative techniques. Our goal was to produce knowledge about leadership that contrasted with the heroic view that has guided previous research. We still sought to support action by producing public knowledge about a breadth of activities that contribute to leadership. For example, one of our papers explores how intensive dialogue with constituents experiencing a given problem leads to creative, grounded solutions (Dodge and Ospina, 2004). While still connecting inquiry to action, action was one level removed from participants' practice, and the researchers' positionality shifted from insider-outsider collaboration to outsider research in collaboration with insiders. The findings of this 'cross-site analysis' transcend the uniqueness of each context, and represent the perspective of outsiders, though they are still relevant for practitioners because they are based on participants' insider perspective.

Advantages. The most significant advantage of this approach was that we have successfully developed materials tailored to very different audiences: participants themselves, practitioners more broadly, and academics. One cooperative inquiry group explored how they, as community organizers, could effectively help others become more strategic, conceptual, and creative thinkers (Kovari et al., 2005). They remarked in their report on the importance of the inquiry for developing their own individual practice:

> We had originally asked how we could *teach* people to be more strategic, creative, and conceptual. What we began to understand during our inquiry was the importance of *engaging* others in the *experience* of strategic thinking. Our own actions and relationships with them would be part of the equation. To help people *learn* to be more strategic, creative, and conceptual, *we* would have to be *intentional* about being more strategic, creative, and conceptual *in relationship with them*. (p. 14)

The group finished the report by reflecting on how the 'cooperative inquiry process … had enabled these personal transformations' to take place (p. 15). While this inquiry was immediately useful to its participants, we have several testimonials from non-LCW practitioners indicating their interest in this and other materials. For example, a nearby consultant who was advising a different coalition in the region found a document we had written about fostering deep partnership in collaborative contexts, based on the narrative data, very useful for understanding how the collaboration operated (Dodge et al., 2004). This transfer of knowledge relates to Gustavsen's (2001/2006; see also Chapter 4 in this volume) notion of knowledge development in large-scale action research projects. He argues that knowledge is transferred when people begin to reference ideas that they learned from the work context of others. This is knowledge in action and represents a relational logic to knowledge development. Finally, we have contributed to academic

conversations about leadership with multiple conference presentations and published manuscripts. This work is ongoing: we continue to develop materials for all three audiences. (For other examples, visit our website at www.wagner.nyu.edu/leadership).

Disadvantages. While our multi-modal design enabled us to flexibly respond to the different interests in the program, not all products were successful with participants. For example, we hoped that the 'leadership story' for each organization, produced during the first stage of the narrative inquiry, would be useful for marketing or fund raising. Indeed, some participants reported using them or simply enjoying seeing the portrayals of their work. However, based on participants' feedback, we decided that the stories' contribution did not warrant the labor involved.

A second disadvantage of our action orientation, given our position within an academic institution, is that many of our colleagues view the separation of action and inquiry as essential to rigorous scientific research. In taking the action turn, we risked facing challenges to the academic legitimacy of our research findings, and our standing as social science researchers within our own community of practice.

Assessment. Balancing needs for local and public knowledge risked the development of materials that satisfied neither academics nor practitioners. Keeping this in mind, we developed different materials to serve different audiences rather than cross-over materials that might potentially reach across audiences. While we were satisfied that we addressed the needs of the different stakeholders in the research, we were still disappointed that we were not able to produce products that could simultaneously serve different audiences.

As the research project moved from data collection to integration – of the insights learned across organizations, research methods and participant cohorts – we became increasingly aware of our overarching charge to change the public conversation about leadership. This meant becoming increasingly

removed from each local site as we strived to ensure that our findings would be transferable to other contexts and generalizable to the theory of leadership. Our positionality moved closer to traditional forms of qualitative research: outsiders working with insiders. However, we still wanted to honor the participatory spirit of the research by feeding this public knowledge back to the participants who made it possible. We are now beginning this process by translating some of our academic papers into practitioner-friendly formats. As we continue writing, we are faced with challenges of voice and representation, a task we take up next.

Voice and Representation

While issues of control, action and voice are deeply inter-related, perhaps the hardest distinction is between control and voice since whose voice is represented is generally decided by those who control the process. We distinguish them by relating control to the process and voice to the product of research. Voice and representation raise questions about 'knowledge from whose perspective?' As Guba and Lincoln (2000) indicate, 'Today voice can mean … not only having a real researcher – and a researcher's voice – in the text, but also letting research participants speak for themselves' (p. 183). For action researchers, voice relates directly to power, with some equating action research with 'the right to speak' (Hall, 2001). Referring to representation, Gaventa and Cornwall (2001/2006) argue that in participatory research 'writing … emphasizes the importance of listening to and for different versions and voices' (p. 74). While our discussion of control described decisions about *how* we created knowledge, in this section we describe *what* knowledge we created: the research products, the range of issues they explore, and the tensions over the material actually included in these documents. (The question of 'What knowledge is created' also invokes a discussion of validity requirements in conventional and new-paradigm qualitative research

as well as in action research. For space reasons we will not engage this relevant discussion. For our approach to validity in this project, see Dodge et al., 2005.)

Our Research Practice: Tensions around Voice and Representation. With each document we created, we had to decide whose voice and whose representation of the world would dominate. While we designed a process to engage many voices at multiple points, each final product represents choices that inevitably excluded some representations. And here our positionality became particularly acute. Positionality represents power: who has the power to make those final choices? That question has arisen over and over in our work. Our choice to take the action turn influenced decisions that ranged from what topics to pursue to what findings to make public and how, and who, would author and write publications.

Because we wanted to learn from participants' direct experience, we designed the research to give participants great influence in the data collection process by naming the aspects of their work they felt deserved study. We wanted this diversity in topics because it would allow us to cast a wide net, and inductively identify issues relevant to the *work* of leadership rather then behaviors and characteristics of individual leaders. We also opened up the writing process in different degrees to ensure that the voices of participants were represented in final products. The diversity of topics reflects a diversity of perspectives; the process allowed new voices to represent their worlds in spaces previously closed to them.

Indeed, participants suggested and pursued a wide variety of issues that loosely fall under the larger umbrella of leadership. The focus of the leadership stories from *narrative inquiry* included topics as diverse as how participants developed and worked with unlikely allies (Walters et al., 2003a), the importance of cultural identity (Walters et al., 2003b) and the way day laborers are invited to use their voice at the policy table (Walters et al., 2003c). While mostly written by our research team, these products were rich in quotations, and in some cases were written by participants.

Ethnographies included topics such as leadership development among community members (Weinberg et al., 2005) and the practice of shared leadership (Hufford et al., 2003). While these products were written by researchers, the process was directed by participants who exercised considerable control over their representations in final reports. *Cooperative inquiries* explored issues such as opening spaces for individuals to take up their leadership (Altvater et al., 2003) and using the arts to support social change work (Aprill et al., forthcoming). These products are mostly written collaboratively among participants, and although in some cases the group authorized the researchers to write final reports, they have done so in close collaboration. As a consequence, participants' voices have clearly been represented in research products.

In contrast, in the *cross-site analysis* used to develop academic papers**,** the research team identified the topics for further exploration, like the use of cognitive framing in social change leadership (Foldy et al., forthcoming), and the paradoxes of managing collaboration within coalitions (Ospina and Saz-Carranza, 2005), and took responsibility for writing these products. We also integrated the learning from across our data set in a tentative model of social change leadership (Ospina and Foldy, 2005). For the most part, as we moved toward cross-site analysis and writing, our positionality has been that of 'outsiders working with insiders' and our voice has been dominant. In a few cases, we have successfully woven together the voices of insiders and outsiders in academic work, by inviting participants to write their perspective into articles (Ospina et al., 2004; Yorks et al., Chapter 33 in this volume). We also continue to create opportunities for participants and other social change leaders to reflect on our interpretations, so that we can integrate their perspectives. For example, we have presented the social change leadership

model at several practitioner forums which have included both LCW participants and other activists. Input from these sessions was folded into future analysis.

Advantages. This approach had advantages related to both the quality of the products as well as the research process. In relation to our products, we brought an often excluded voice, that of community-based leaders, into the public conversation about leadership. The diversity of voices allowed us to capture the complexity of the experience of leadership. Also, because of our commitment to include relatively unmediated representations of participants' voices, many of the products use a language, style and perspective that are more accessible to other members of the same communities. In other cases, we used photography and video to showcase participants more directly. Both these strategies increased the likelihood that the knowledge created would be of direct and immediate use to those involved. Finally, this approach enhanced validity, since those with the lived experience had an undeniable expertise. Regarding the research process, producing interpretations and conclusions that were sanctioned by participants reduced the likelihood of exploitative research that used people's experience and knowledge toward an end they did not support.

Disadvantages. One significant challenge of our hybrid design, given the goals of sharing ownership and honoring a broader range of voices as relevant for the research, was that we had less autonomy to interpret data and draw conclusions. Of course, as in more conventional qualitative inquiry, we were constrained by the rules of our research community to ensure that interpretations were the result of a systematic process. But traditional qualitative researchers, like their quantitative counterparts, have more degrees of freedom to pursue their own understandings of the data than action researchers do. By developing a hybrid approach, we were accountable not just to the data, and not just to standards of quality, but to participants who had a vested interest in research findings and the

knowledge that was ultimately drawn from the research.

This challenge manifested itself particularly in materials describing a single organization. We decided early on that materials of this type must be approved by the organization since they could potentially be damaging. Occasionally, this meant avoiding material that participants felt was inaccurate, misleading or potentially harmful to their work. For example, one ethnographer deleted a section of the report which included information that participants felt could harm a collaborative process that was underway. We also chose not to make public several leadership stories that participants ultimately decided did not accurately represent their work. We also ran into difficulties in one of our cooperative inquiries when participants of one group excised entire sections of the report that they felt represented the facilitator's point of view and not their own.

An additional constraint had to do with the fact that the design of our research favored positive assessments of the participants' work. Participants in LCW were chosen because they were exemplars of outstanding leadership. In our narrative research we used appreciative inquiry (see Chapter 19 of this volume) to surface what they were doing right, to better understand how effective leadership happens. The generative approach helped us connect to participants and overcome suspicions they had of us, as well as bringing depth and richness to the interviews. But it also determined the types of stories that we heard. Sometimes an appreciative approach was confused (by participants as well as by members of the research team) as an invitation to whitewash the messiness of real experience by downplaying its problematic dimensions. In addition, while we encouraged participants to invite stakeholders who might be critical of their work into the conversation, we ultimately spoke to the people that participants suggested, thus missing an opportunity to represent the work of leadership in contested contexts. We would have had difficulty

establishing trust with the participants in any other way, but it does represent a limitation of our approach.

Moreover, the very diversity gained by making room for multiple voices and topics made generating clear and cogent learning a daunting task. *Integrating* the knowledge gained within each method, across the three different methods, and across the cohorts of LCW participants to generate transferable public knowledge has been very challenging. A more traditional design would have generated *comparable* local knowledge in order to produce a straightforward comparative analysis. Doing so would have made integration easier, but would have failed to capture the richness we gained. In other words, adopting a participatory approach – in terms of producing multi-vocal local knowledge – has added interpretive complexity to generate public knowledge.

Assessment. Action researchers have suggested that success of the research depends on the ability of practitioner-participants to bracket their insider perspective and take the position of an outsider, thus being able to view themselves in a different light (Heron and Reason, 2001/2006; Kemmis and McTaggart, 2005). But this can require support from skilled researchers, based on a sustained and intimate trusting relationship. In our case, while we were able to establish this type of relationship with some participants, the scale of the project precluded this across the board. For this reason, we have wondered about the advisability of 'doing action research with a large N' as one team member put it. The depth and quality of relationship that was necessary to maintain a critical stance while holding to the fourth positionality – 'reciprocal collaboration' – suggests working with a much smaller number of groups.

In sum, issues of voice arise in several arenas. Inviting multiple voices enhanced the diversity and richness of the data, but also posed challenges in creating a clear and consistent argument around the overall findings. Ultimately, those multiple voices represented multiple interests, each of which may have had a strong stake in what was concluded. Action research and qualitative research can diverge here, with each favoring a different stakeholder. While hybrids are certainly possible, they may fall short of the exacting standards of each type. Researchers entering this territory should take care to craft appropriate standards that draw from each approach (Dodge et al., 2005), and be satisfied that they will not be able to live up to the separate standards of each.

CONCLUSION

We have told our story, of qualitative researchers deciding to adopt participatory practices, in an effort to develop more insights about the very real challenges of combining action research with traditional qualitative designs (for a discussion of other challenges related to doing action research see Chataway, 1997; Kemmis and McTaggart, 2005). As we have documented, we began knowing that we had to satisfy three very different audiences with very different interests and preferences. We have had to meet the demands of the funder for public knowledge; we have had to establish trust with the participants, many of whom were suspicious of academia and craved immediately practical insight; and we had to answer to the research requirements of an academic community distrustful of participatory research. For the most part, we succeeded. While there are moment-to-moment decisions we would love to revisit, we do not believe that a significantly different design could have satisfied these divergent set of requirements. But we wanted to clearly illustrate the very real tensions that such a path brings with it. Calls for qualitative research to take the action turn may inadvertently suggest that such research involves a set of discreet, relatively straightforward decisions rather than an ongoing and intense grappling with competing demands that involves continual self-reflection, group discussion, and

stakeholder negotiation. The issues of positionality and knowledge production point to the complex political landscape researchers enter by taking the action turn.

In addition to illustrating the trade-offs of moving towards more complex and responsive research, we also want to contribute to the development of more democratic research practices. Respect and appreciation for the diversity of paradigms to approach research problems was a pre-condition for crossing the boundaries to produce the hybrid research practice we believed would help us accomplish our research goals. In doing so, we embraced Toulmin's (1996) notion of 'methodological democracy' and, like him, rejected a fixed definition of social science as 'a single universal set of procedures, applicable in investigations of all kinds, regardless of the subject matter or interests involved' (p. 204). We agree that good social science comes in many forms that can be located within 'a spectrum of research fields, with varied goals, and different methods of investigation', all of them legitimate in their own way (p. 223). We hope that as many of us continue to experiment, the larger research community will develop tailored standards of quality that speak to multiple demands (Dodge et al., 2005). But as we open the door for hybrid practices, we ought to realize that legitimacy cannot be taken for granted. Instead, it must be earned step by step.

Reflections on our experience with hybridity offer important insights for those who may decide to pursue similar paths that mix paradigms and methodologies. The primary lesson we want to share is that bringing in a participatory perspective to more conventional qualitative research has produced important benefits, but it has also been extremely demanding. As qualitative researchers face Guba and Lincoln's call for action (2000, 2005) and Reason and Bradbury's (2001/2006) invitation to take the action turn, it is incumbent to keep in mind that the challenges of hybridity add yet another layer of uncertainty to the always thrilling and sometimes painful adventure of doing rigorous, useful and relevant research.

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