



DIFFERENT RESEARCHER PERSPECTIVES: A SOCRATIC DIALOGUE

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This essay is part of a series of papers commissioned by The Partnering Initiative through its Case Study Project to develop insights into the process of researching/writing partnership case studies as tools for change.

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Anyone working on case studies faces a number of challenges; one such challenge is that of language. There are (at least) three forms of 'language' challenge that impact case study data collection and writing.

The first is that of working across different language groups where misunderstandings occur only too easily because words and concepts are misinterpreted or misunderstood. Even within the same language group there is potential for misunderstanding (Britain and America, for example, are often described as two countries 'divided by a common language').

The second is to do with 'sector-speak' – in other words the (seemingly inevitable) jargon that grows within the public sector, the private sector or civil society that can easily alienate when trying to communicate and work cross-sectorally.

Case study researchers and writers need to be aware and attentive to both these language challenges in all aspects of their work.

There is also a third kind of language challenge in case study work. This is the radically different ways of thinking, understanding and speaking that case study writers will bring to their work as a result of their individual academic discipline or professional training.

This essay explores how a number of individuals from quite different disciplines and professional backgrounds – all of whom have undertaken valuable partnership case study work – approach the task. In this investigation, we seek to explore the interesting diversity and range of approaches rather than to stereotype or denigrate one approach over another. We invited 7 individuals from different academic and professional backgrounds to complete a questionnaire about how their approach to case study work had been shaped by their academic and professional background.

The individuals involved were:

- **An Actress** – trained in theatre and drama, she was also a T'ai Chi practitioner and nutrition therapist. She has spent the last 14 years working to promote partnerships and learning programmes for sustainable development.
- **An Architect** – trained in Architecture, she became involved in social housing, slum upgrading and improving living conditions for the poor in developing countries. She now runs an international research institute focusing on local-level actions for community development.
- **An Engineer** – trained in Civil Engineering and European studies, he went on to study an MA in International Relations and International Studies. He worked on engineering projects in developing countries and as a consultant, before joining an international cross-sector learning network focused on multi-sector partnerships for water and sanitation. He is also our Political Scientist contributor – proving that each individual can play many roles as a researcher.
- **An Historian** – after studying history and subsequently African Studies, she worked as a teacher in Africa, then with various non-governmental organisations around information, human rights and sectoral relations issues. She is an independent consultant who specialises in the management, training and evaluation of cross-sector partnerships and socially responsible business practice.
- **A Linguist** – having studied Hispanic Studies and currently studying Development Management, she has travelled Latin America extensively and worked with higher education bodies in the UK, in the communications sector and with NGOs. She now works with an international cross-sector learning

- network focused on improving access to safe water and effective sanitation in poor communities.
- **A Physicist** – trained as a physicist, he now works with partnerships for sustainable development. Initially he worked on how the business community engage in partnerships, more recently he has focused on how to exchange and promote partnership experience and knowledge. He is an experienced facilitator and trainer in partnership.
- **A Social Scientist** – initially a family therapist and social worker, she studied business and psychology. She has extensive experience in brokering and working with partnerships in the areas of business development, education and training and gender.

In the write-up of their responses that follows, the individuals are not named; rather they have been called by the name of their initial discipline, simply to distinguish between them and to observe how far their approaches are influenced by that discipline. In fact, once we begin to hear their voices and follow the narrative thread of each individual's contribution, we soon realise that they are not locked into their disciplinary category: they all think and work across the conventional boundaries of their disciplines.

In addition to the fact that each of these individuals has entered into case study writing from different backgrounds, they have also embarked on this work for different reasons. For some, their job dictated that they write about a specific partnership; for others it was a way of documenting their professional learning and experiences; while others used case study writing as a way of raising awareness and publicising partnership examples. Each had their individual views of what a case study might be, including:

- comparatively informal reports or reviews;
- more formal pieces of academic research or project evaluation;
- verbal narrated stories to prompt training or a discussion, etc.

We do not offer an analysis of the different approaches taken; rather we present the responses to the questionnaire, virtually unedited (though sometimes abbreviated!) in order to allow the reader to have their own approaches challenged and to come to their own conclusions about the way case study work changes when undertaken by people from different disciplines, professional backgrounds and 'languages'.

The conversation below takes the form of a Socratic dialogue¹ where a novice case study writer is eager to have constructive inputs from others and to learn from their experience.

(Novice) “Where do I start when writing a case study? What do you do first?”

¹ A Socratic dialogue is a prose literary form, either dramatic or narrative, in which characters discuss moral and philosophical problems or concepts used constantly without any real definition. In this method, a series of questions are posed to help a person or group to determine their underlying beliefs and the extent of their knowledge. It is a *negative* method of hypotheses elimination, in that better hypotheses are found by steadily identifying and eliminating those which lead to contradictions. It was designed to encourage one to examine their own beliefs and the validity of such beliefs. Description from http://encyclopedia.worldvillage.com/s/b/Socratic_method

(Engineer) "I start by trying to figure out why I am there in the first place. What points am I trying to make? Who is the audience and what will they be receptive to? I have always started simply by trying to understand the 'who', 'what', 'where' and 'why' of a partnership and I look for an organising framework to analyse the situation. However, this can risk becoming rigid and unlike a narrative story, it may turn into a 'box filling' exercise. I try to keep a balance..."

(Social scientist) "For me, as a researcher, I view case study writing as another form of research. The type of research methods I might use will be dependent on what I am researching and the purpose of the research."

(Architect) "The starting point is simply the definition of the problem to be solved and aim to establish the success or failure of the intervention."

(Novice) "I see, you have underlying assumptions and beliefs that help you to determine where to start. What would I do next? How do I develop a research methodology?"

(Actress) "I always start with open questions: Why am I doing this? Who is it for? What do I want to know? What do they want to know? How will it be used? What will keep it lively? I try and go into every situation with a completely open mind and not get bogged down by too much methodology. I have a pretty broad ranging collection of books from many different disciplines in my library, but I consult these away from a specific case study project and try to build a methodology from scratch from the particular circumstances of each one. I am a quick thinker and shamelessly eclectic and 'mix and match' from anything and everything I see, hear and experience. I am sure that any time I work on a case study I instinctively looking for the epic message in the simplest activity and conversely for the actual reality beneath the public rhetoric."

(Historian) "The study of history has been likened to detective work as it involves gathering evidence from as wide a range of sources as possible in order to piece together a picture of what happened. I always seek out as much relevant material as I can find and draw exhaustively on both primary and secondary sources. Sometimes it is hard for me to draw the line as I can go on and on collecting the evidence, but there comes a point when it needs synthesising, prioritising and interpreting. The task of organising and pulling out key learning from large amounts of material is central to historical study."

(Novice) "So, I can take different approaches and make a start. Surely there's something specific about 'partnership' case studies that I should know?"

(Physicist) "Correct, each partnership is unique and complex; they are all set up differently, with different dynamics, partners, legal aspects... analysing them is very difficult. As a physicist, I want to categorise them, to create variables and theories and test them elsewhere. But I realise this is so complicated and that it can't actually be done."

(Linguist) "I want case studies on partnerships to be open and accessible for all to read; not to be exclusive because of complex language or other access issues. I choose my words carefully. Partners can come from different sectors, different countries, different perspectives – the dynamic between them and the process of partnering can be impacted upon by you, particularly by what questions you ask and how you ask them."

(Novice) “Which partners do I talk to? How do I do it? What considerations should I think about?”

(Actress) “As a young adult I grew up quite unwilling to conform to expectations. My indignation about ‘conforming’ led to a determination to create new approaches to social activity and engagement. My motto for years was: If it doesn’t exist, invent it! I suppose I see every partnership as an opportunity for inventiveness and for challenging and improving on the ‘status quo’ and I would like the case study to capture that.”

(Historian) “I agree. Historical research has changed over time – moving from documentation of the powerful; male leaders from social classes and countries with power (what is sometimes jokingly referred to as “HIS story”), to more recent investigation into the lives of ordinary people and those previously considered marginal to events. My case study research has sought to constantly probe beneath the surface of things, looking at and reporting those whose stories might be excluded, ignored or marginalised.”

(Political scientist) “I attempt to take a participatory approach and speak to partnership practitioners first. This helps me find out who and what they know in order to find out what I want to know, what the potential audiences want and to get ‘champions for dissemination’ interested at an early stage. I aim to put myself into others’ shoes to understand contextual factors; where the partners ‘sit’ institutionally, why they make certain comments and respond to their situation in particular ways.”

(Linguist) “I also want case studies to involve the ‘partnership subjects’ directly, rather than just a desk-based or literature review approach only. I am constantly reminded of the power relationships between partners and determining who has ‘permission’ to represent the others involved. I am also cautious of participatory approaches and aware that peoples’ expectations of a partnership, its process and outcome can become very high and potentially not achievable.”

(Novice) “I could speak to a lot of people, read many reports, undertake a wide range of research... but how do I know I’ve found out the ‘truth’ about a partnership?”

(Architect) “It is critical to be able to revise and put into context concepts and situations that are considered an unchangeable norm. We have to train ourselves and others to be objective and sensitive to different rationalities.”

(Historian) “My approach is also linked to an understanding that no one story or source is completely reliable - they may be incomplete, inaccurate or biased. When I use secondary sources e.g. a book or report written about the topic I am researching, I ask myself – who produced this? Where and when? What was its purpose? Who/what was the audience for it? Why might they write in this way? If I am drawing from a primary source e.g. a person involved in the case study I am writing up, I am always aware that I will need to ‘test’ their account against others in order to assess how real the picture that I am being presented is.”

(Engineer) “Presenting interim findings to practitioners means they have some sort of reviewing, approving or sanctioning role. However, they’re not objective and may request changes. It’s then based on subjective discussions – so I aim to triangulate findings to aim for more objectivity. Some don’t like that approach – especially engineers! When information is subjective and stems from personal opinion, do you quote directly or turn it into objective fact

as you write about people? There is often a schism between the engineering participants who want things 'measured' rather than 'going away and talking to people'. What people perceive to be 'the truth' might not be objective fact but it's still valuable. After all partnership is a relationship between people."

(Novice) "So, there may not be a 'truth' out there... what else should I consider?"

(Physicist) "I am influenced by the purpose of the case study and for whom you are writing. Whilst interviewing, I might consider how the questions and answers will be interpreted by the audience. Maybe case study writing should be influenced in this way; what are you trying to do anyway? Reveal 'truths'? Do you actually need to be 'right' if a case study is useful or fits its purpose?"

(Social scientist) "I suggest that working with what the researcher may have projected into the research can produce a creative dialogue between the researcher and the partnership. I realise that how people speak to me has an influence on both me and the research. Equally, my role, as researcher, influences those taking part in the research. Therefore, as part of the research, I would go back, discuss and ask more questions.... Research is not just about what you see and hear, but also about interpretation."

(Linguist) "I am pedantic about semantic detail, not necessarily about the 'facts' but about clarity and consistency in order to enable readers to understand the issues discussed. I have a deep seated desire to be more 'objective' but realise it's not really achievable. Words cannot always readily express concepts and the most that we can do is to try and unpick and understand the different potential meanings of words used."

(Actress) "My prompts to gather case study material are: the need to make the rhetoric real (i.e. in promoting a partnership approach it is essential to give practical examples of partnerships in action); and my belief in the importance of 'capturing experience' as it happens especially if it is transformational and / or temporary. I use actual stories (myths, fairy tales, etc.) as ways of illustrating partnering principles or in skills training: using allegory and metaphor to deepen insight and learning. Thereby encouraging all those involved in partnering to be truly imaginative in their approaches, to see the wood for the trees (i.e. the bigger picture and the significance of what they are doing) and to become good story tellers themselves."

(Historian) "People rely on memory to report events, they can exaggerate, they can leave things out because they are embarrassed or ashamed and, crucially, they can often concentrate on societal perceptions of what is perceived as powerful and/or important and leave out what they consider to be everyday and mundane. Often the information that is excluded from people's accounts is as important as the information that is included e.g. little everyday details, that interviewees or writers might take for granted, are precisely the nuggets of information you might be after!"

(Novice) "Multi-stakeholder partnerships comprise various partners: people with diverse perspectives and languages, representing different sectors and possibly different cultures. How do I take all of this into consideration?"

(Physicist) "If you happen to share the same culture and language you may learn a lot quite quickly, but imagine the additional challenge of working cross-culturally and in different languages. I want to be a better case study writer, but I realize that the way I work is so

culturally and country-orientated. I do make efforts to realize this and try to challenge my own assumptions and beliefs.”

(Linguist) My problem with ‘culture’ stems from my obsession with language; how it is used and what it is supposed to mean. At worst, language can obscure and provide fodder for misunderstanding; at best, it can aim to convey something to as many people as need to hear it. Yet, we are not only challenged by the different tongues and sectoral language that we speak, but how we impose cultural perceptions and understanding on everything. We may be able to translate words into a different spoken language, but can we truly translate the underlying concepts and cultural nuances?”

(Actress) “Essentially, I invite partners simply speak in their own ‘language’ (asking for clarification if I don’t understand something). Where possible I write the case study in the different ‘languages’ they have used thereby seeing the case study itself as promoting insight and understanding in the cross sectoral and cultural diversity typical of many partnerships. In other words I go out of my way not to homogenise the language. If working in a group, I would use the data collection process to help different parties explain their ‘languages’ to each other.”

(Architect) “I recognize that I have to make provisions to overcome the barriers posed by different rationales or logics of the partners. For this it is necessary to discuss basic words or concepts and to agree on a common language. I have learned a lot from other researchers and practitioners in forums, workshops, publications and from the interchange of views and experiences with other municipalities, NGOs and CBOs. It helps us to see our project within a broader national and international context.”

(Novice) “What people say and how they say it is very important then. In addition to the many different ‘languages’ being spoken by the partners, what else should I consider?”

(Actress) “Trained in drama and theatre, I was required to study movement, the senses, voice, texts, characterisation, performance, design and more. I realise that quite intuitively I draw on all this by: listening to the voice as well as the words; looking for ‘patterns’ in behaviour / events / personalities; listening for sub-text (i.e. what is NOT being said); and getting ‘inside the skin’ of the different characters involved.”

(Engineer) “It’s not just language. I believe that different cultural references evoke different sympathies – people have different standpoints or starting points, so how you create a case study can already have alienated part of your audience. If you want to understand the audience – and they’re all very different – you need to find a middle ground. I believe that ‘sectoral’ differences, whether you are from civil society, the public or private sector, become less of a barrier than cultural differences. How can we overcome this? You would have to write the case study again in another ‘language’ to be able to be truly cross-cultural.”

(Historian) “There is also your disciplinary culture. My academic discipline has deeply influenced my approach to the research and collation of partnership case studies. It has taught me to believe that you can only understand the present, and make decisions about the future, if you understand the past. As a result I am extremely rigorous about situating the partnership firmly within its empirical context - carefully reading and learning about the environment in which the partnership is placed and seeking to understand the political, economic, social and cultural factors that shape this, particularly in relation to where, how and why these have emerged over time.”

(Novice) “It seems that there is not one ‘correct’ approach to case study writing; there are so many considerations to take into account. If we could all get together, surely we could create better case studies. How can we help each other? Who else should I consider working with?”

(Architect) “Actually for me, there is never a single author for our case studies, we are a team and we write together combining different disciplines and visions; this team includes an architect, a geographer, a sociologist and an anthropologist. Additionally, we discuss the draft documents with other partners before presenting the cases or publishing them and on many occasions we include text boxes to air their views.”

(Linguist) “As part of a small team of three we often review and refine each others’ work. This is as much for peer review as for garnering different input from our diverse backgrounds and perspectives. We trust each others’ judgements and input, recognising that each brings something completely different to the table. Over the years, our writing has probably become more aligned which I assume is a good thing though now and again it may need shaking up a bit to avoid us becoming complacent!”

(Historian) “Historians are acutely aware that different values and beliefs shape ‘the evidence’ and thus interpretations of it will always be subjective. In my case study work a key task is to assess different interpretations of a partnership and its processes. In doing so I am aware that my own particular background and beliefs also need to be scrutinised in relation to my work. Thus, a critical review process is vital and I tend to give case study drafts to a selection of people from different academic disciplines and backgrounds to obtain their perspectives on it.”

(Novice) “We can help each other by offering different perspectives... don’t we all have multiple perspectives on partnerships and case study writing anyway? As individuals we surely wear many hats already.”

(Engineer) “I try to understand the wider context of a partnership in order to see the bigger picture of a situation, which is quite different from a typical engineering approach. I try to meld these different approaches in my work; for example I developed a partnership analysis report framework where there is a contextual and scene setting section at the beginning and then an analysis of the structures later on.”

(Actress) “I am a relatively un-trained (though not necessarily undisciplined!) person but I try to apply the lessons I have learnt from many aspects of my life to my case study work. For example, I studied T’ai Chi Ch’uan for many years. This required intense observation together with physical and mental coordination and discipline. In case study work I apply many of the same rules that I learnt from T’ai Chi. I try to still my mind and to simply see what emerges, looking for patterns, balance and imbalance in whatever ways they show themselves. In other words, I assume that the story will tell itself and that my role is to simply give the process my total attention.”

(Novice) “If our partnership case studies are unique to that partnership, who else will read them? How can others learn from them? Can they have a broader, more universal appeal?”

(Social scientist) “To make case studies more universal, the ‘learning’ from the partnership being studied needs to be highlighted so that the case study becomes applicable to other

situations. It is the researcher's role to pull out the 'learning' in collaboration with the partnership and to present it in such a way that it becomes a creative and useful tool for others."

(Engineer) "To make case studies more accessible and to have wider appeal, I would like to use a less formal style and use everyday terms rather than trying to 'make them look academically acceptable'. Rather than being neutral, you can take an individual's personal journey and tell their story. Take a snap shot of people's lives. This gets to the same end point but the journey is far more interesting. Then the audience takes what they want to learn rather than turning the learning into pseudo-science!"

(Linguist) "Partnership case studies can be very individual because they are designed for internal use by partners themselves; hence it can be difficult to present learning points to others. Undertaking a case study often becomes part of the partnering process itself; the partners change and adapt by the very process of asking them questions and collecting information. You can't go in and leave no trace. However, how you tailor, present and disseminate the case study can encourage a broader application and appeal. The recipients of case studies ultimately chose how to interpret the data, but you can make it easier for them by considering whether it will fulfil their learning needs?"

(Historian) "I know that there will always be 'living contradictions' where interpretations of the evidence don't appear to coincide. As a historian this really doesn't bother me, people interpret things differently and these differences contribute to making a case study more interesting. When accounts seem completely irreconcilable this can be the beginning of a deeper and richer study which explores why such differences have emerged and what has impacted these. Sometimes it is where the real story begins! Being honest and open about such contradictions and not seeking necessarily to reconcile them, I think we begin to give case studies a more universal appeal. At the same time, as a study of history shows us, people's opinions, thoughts and attitudes do not remain static; they change and develop over time. Capturing this dynamic is also important and it makes a story more alive."

(Actress) "I have used partnering case studies presented verbally and now run awareness-raising and skills training workshops using real case studies as the basis. This has proved incredibly popular and effective: the case study becomes a tool for creative thinking and for professional development by inspiring confidence, building courage and supporting creativity,"

(Novice) "If I were to approach writing a case study now, I would consider many of your experiences and think about what you have suggested. What other considerations should I be aware of?"

(Social scientist) "It is helpful to be aware of the structural relationships between the researcher and the partnership. It is important because it is too often ignored in research and it is easy to fall prey to implicit power relations."

(Linguist) "I have many concerns over the all-powerful role of the author; especially when you are documenting fragile partnerships or views of others who may not have a voice normally (e.g. poor communities lacking services). You cannot look at and explore something without changing its very nature. All we can hope for is to leave fewer and smaller footprints..."

(Historian) "Voltaire asserted that, "A historian has many duties. Allow me to remind you of two which are important. The first is not to slander; the second is not to bore." These are important elements of case study writing for me; respecting your sources and the information that you have to hand; and interpreting the evidence from them so that it is recounted in a way that captures people's attention. Ultimately the aim is to generate interest and assist our learning so that we understand things better. Case studies – if they are recounted well – can provide lessons that enable deeper understanding and the motivation to improve, change and build stronger partnerships."

(Novice) "Are there any other pieces of last minute advice or suggestions?"

(Architect) "There are two different aspects to be considered really: your strategy and your theme. For the first, remember that methodology and tools are very pertinent. For the second, study experiences and show the use of alternative solutions for problems faced by many other groups in the region (South America) or around the world."

(Engineer) "I feel that the partnership fraternity should shed their pretensions and use more quotes, be more journalistic, present opportunities for the audience to follow up with the author or the subjects. I want to avoid case studies that are written to be published and that's the end of the story. I would rather find out more so that I, the partners and others keep learning."

(Actress) "I realise that I see partnerships for sustainable development as being – potentially – of radical importance in changing the way we live in our world and therefore what I look for when involved in case studies of partnerships are those 'transformational' ideas or moments when radical change suddenly seems to be possible."

(Physicist) "To date, I haven't drawn learning or conclusions from case studies; I have tended to use them as a people-friendly way to publicize partnerships. It is very hard to draw lessons and generalities from case studies, but I really do want to create 'living' case studies, where different people take different things away from them: to make them dynamic and making the story come alive. I need to look at more case studies; but read them with new eyes!"

(Novice) In conclusion then, there are a variety of considerations to take into account when writing partnership case studies for broader learning. I feel I have learnt a lot from your experiences and will be better equipped to tackle case study writing in the future.

Your different experiences have shown me that it is not just your academic background or professional training that determines your approach, rather that there are benefits to taking looking at the task from different perspectives and drawing on a variety of elements and from the experiences of others. I can use this knowledge to develop my own methodologies and processes. I realise that I need to challenge myself constantly; to remain alert to how and why I am writing the case study; to ensure that I am aware of the complexity of partnerships, the partners, their culture, their language and their needs; to revise and review what I have written with assistance from others including the partners themselves; and to ensure the case study is fit for its purpose.

Thank you all for your valuable advice and ideas; I now at least know where to start!

Conclusion

We hope that this exploration prompts a sense of excitement about the added value of either drawing on different disciplines in the way one works as a case study writer, or alternatively working with a range of colleagues to build an inter-disciplinary approach. Our considered view is that, since case study writing is an iterative process and involves engaging with a number of different players and situations, there is particular value in working in an inter-disciplinary way to ensure that maximum and multi-layered information is accessed and interpreted in ways that are appropriate, useful and truly fit for purpose.

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CASE STUDY PROJECT