Institutional Ethnography: Mapping out Textual Mediation and Ruling Relations in Information Systems Research

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Abstract

Institutional Ethnography (IE) offers a new theoretical perspective to guide inquiry within the information systems field. IE begins with a problematic – a disjuncture – that asks how some particular corner of the world is organized and answers this question through ethnographic techniques to explore the lived experience of the people at the core of the research. From this standpoint, institutional ethnographers map out how this experience is textually mediated and coordinated (organized) within a complex web of institutions and others.

We reinterpret the findings from two research studies to demonstrate how an IE lens facilitates asking new questions and contributes new understandings around fundamental IS topics. We offer a discussion of the merits of this approach and conclude with some recommendations for how researchers can leverage IE in their own work.

1. Introduction

Institutional Ethnography (IE) arose out of the feminist work of Dorothy Smith in her efforts to develop an alternative sociology that “builds knowledges of how relations of ruling operate from the standpoints of the people participating in them …” [1]. It starts at the everyday (everynight) life of individuals and shows how their lives and actions are coordinated within a complex web of institutions and others. Given that it is now widely recognized that information systems are not just a technical but social phenomena [2,3], IE’s potential applicability and usefulness for IS research is considerable.

In the remainder of this paper, we demonstrate IE’s importance to IS research through two research examples. We end by investigating the critiques of IE and discussing future opportunities for IS researchers.

2. Institutional ethnography

2.1. IE as a theoretical perspective

An IE investigation begins from the standpoint of people’s everyday experience. “Standpoint” is an idea closely associated with feminist thought but takes on different meanings for different theorists [4]. In IE, standpoint refers to embodied experience:

The embodied knower begins in her experience. Here she is an expert. I mean by this simply that when it comes to knowing her way around in it, how things get done, where the bus stop for the B-line bus is, at which supermarket she can pick up both organic vegetables and lactate-reduced milk, and all the unspecifiables of her daily doings and the local conditions on which she relies – when it comes to knowing these matters, she is an expert. [5]

We can see here IE’s phenomenological and ethnomethodological roots; however, the intention in IE is not to remain at this experience. Smith points out that the embodied knower may be expert in her experience but may be unaware of how the various things with which she interacts in her daily life come to be. What is the institutional complex by which the vegetables come to be considered “organic”? How does the bus company come into daily existence and why is the bus line and stop where it is? The answers to these questions reveal what Smith calls ruling relations. She describes these as “that extraordinary yet ordinary complex of relations that are textually mediated, that connect us across space and time and organize our everyday lives” [5]. This complex of relations includes (but is not limited to) corporations, government bureaucracies, mass media, academic and professional discourses, and the complex of relations that interconnect these. Revealing these is the project of IE.

To do this, IE focuses on texts.
When institutional ethnographers talk about texts, they usually mean some kind of document or representation that has a relatively fixed and replicable character, for it is that aspect of texts – that they can be stored, transferred, copied, produced in bulk, read them, change them, and act upon them – but they flow to and from other extra-local settings and, in this way, coordinate activity among people.

It is in this focus on the actualities of people’s lives and on the material ways that their activities are coordinated that Smith creates a sociology which explains the social – the ongoing coordination of people’s activities – without resorting to what she calls “blob-ontology” [5]. In traditional sociology, concepts such as “social structure”, “bureaucracy”, “power” and “role” are reified, or brought into being as real [5]. However, subjects and agents disappear in the shadow of these theoretical concepts; the concepts appear to exist independently of those who enact them and become seemingly stable through time and space. IE brings awareness to how these social phenomena really happen, by mapping out the material activities and coordination among activities that lie behind these concepts.

### 2.2. IE as a research method

As a research method, IE falls into a broader category of ethnographic methods -- “a family of methods involving direct and sustained social contact with agents, and of richly writing up the encounter, respecting, recording, representing at least partly in its own terms, the irreducibility of human experience” [7]. Information systems researchers have been using ethnographic methods because of the recognition that information systems are implemented and used in situated contexts through the work of situated individuals [8,2,3].

IE is, however, a specialized type of ethnography. In conventional ethnography, emphasis is placed on cultural description and interpretation of meanings [9]. In IE, data collection starts with the individuals and their everyday (and possibly everynight) life, and involves typical ethnographic methods such as interviewing, participant observation and textual analysis. The focus, here, is not on the meaning individuals ascribe to their activities as it would be in a conventional ethnography, but instead on making visible the institutional and social organization that is embedded in the work (referred to broadly as “doings”) that these people report and describe.

IE research starts at a “problematic” [10]. It “direct[s] attention to a domain of possible questions, and distributed widely, allowing them to be activated by users at different times and in different places – that allows them to play a standardizing and mediating role. [6].

Texts and text-mediated discourses occur in and are activated in local settings – people create them, questions which have not yet been formulated, but which are implicit in the way the everyday world is organized” [11]. It is not a problem that an individual informant is experiencing nor is it a research question [10]. Rather, it is a particular complex of relations to be explored, from a particular standpoint.

Once the problematic is set, carrying out IE is similar to carrying out most ethnographic research. Interviews are often a primary data collection tool in IE. Interviewees are interviewed to understand how they describe their work and experience. To keep the focus on “listening for texts” [6], interviews are generally open-ended and attend especially to textual practices and how these are enacted in the interviewee’s everyday/everynight work. Participant observation may also be used to identify additional texts and to identify where and how identified texts are embedded in processes. In particular, institutional ethnographers are interested in the ways that people's work and knowledge needs are produced as knowable and made actionable through and by texts.

As the texts and text-mediated discourses that organize a particular setting are identified, data collection expands to follow these texts to their extra-local settings – who created them, who use them and what purposes they serve. This allows the institutional and organizational relations that shape and organize individual experience to be mapped out.

### 3. Research studies

To demonstrate the value of IE, we draw on two research studies that were ethnographic in nature. The first was a critical ethnography looking at participation in the requirements process, using Habermas’ discourse ethics [12]. The second employed Structuration Theory [13] and genre analysis [14] to understand how the knowledge management activities of a group of patent lawyers were enabled and constrained by the existing and new information systems in a large law firm. Re-interpreting these studies through an IE lens allows us to demonstrate how IE can contribute new understandings to IS research.
We describe each study next. The first example we refer to as the Participation Study; while the second, we call the Knowledge Management Study.

3.1. Participation study

The first example comes from a larger ethnography, following the implementation of a Clinical Information System (CIS) in a large Canadian health care organization, which we’ll call Hospital Group. Hospital Group was implementing the new CIS system in order to integrate patient information from its existing and disparate information systems and to provide integrated physician order entry and results, and clinical design support (such as automatic notification of patient allergies and best practice protocols). Much like an Enterprise System, the CIS was a packaged information system that had to be configured to work in the specific organizational context.

Hospital Group was committed to engaging clinicians in the process of deciding how to configure the software. To do this, the Clinical Informatics Group who had instigated the project created a project structure that included:

- a steering committee of Hospital Group management to provide oversight of the project,
- a project team – composed of project managers, business analysts (some of whom were previously clinicians) and clinicians – to manage and undertake the configuration,
- a Clinical Design Team (CDT) – composed of clinicians and a few hospital administrators – to provide input to, and clinician approval of, the configuration, and
- various ad hoc working groups to look at issues that required more analysis than could be accommodated within the CDT.

The original research project was a critical ethnography using Habermas’ Theory of Communicative Action [15] and discourse ethics [12]. The purpose of this research was to explore the ways in which communication in the requirements process was both constrained and supported, simultaneously preventing and encouraging participation. As an ethnography, the main elements of data collection were participant observation (approximately 220 hours over 15 months, of this 200 hours spanned a 6 month time period), 18 post-implementation interviews with participants, 2 follow-up interviews with key stakeholders and document collection (over 500 documents).

3.2. Knowledge management study

The second study employed ethnographic methods within the Intellectual Property Group of a large law firm to investigate how patenting practices were both enabled and constrained by the range of technologies at their disposal, with particular attention given to a newly introduced knowledge management system (KMS). Case file data maintained as a part of the ongoing record keeping of the group was used to gain an initial understanding of the patenting practice. Data collection occurred over a 15-month period from September 2004 to November 2005. The second author was onsite each week for varying durations (typically three days per week) between April 2005 and November 2005, during which time case file reviews and multiple rounds of observation and interviews were conducted. The primary data collected consisted of three banker boxes of case file data and approximately 20 hours of interview data, which were transcribed into 400 double-spaced pages of interview notes. Secondary data were drawn from literature on the patenting industry and the role of patenting in society. The full complement of participants representing the core of the patent group ultimately consisted of three lawyers, a paralegal and the CIO.

4. Institutional ethnography in practice

Four fundamental concepts – problematic, standpoint, textual mediation, and ruling relations – can be used to characterize IE and how it is undertaken. In this next section, we demonstrate each of these concepts using the two research studies outlined.

4.1. Articulating the problematic

The first key characteristic of IE which we will consider is that IE research flows from a problematic. Often, the problematic becomes known to the researcher through a disjuncture made known through her own experience [c.f., 16,17] or through discussions with others [c.f., 18]. For example, George Smith [19] investigated police raids on a Toronto bathhouse because of the disjuncture between how those who went to the bathhouse experienced it and the way it was known to police. The problematic for Smith was to map out how (not why) it became known in this way.

The problematic for Dorothy Smith and Allison Griffith’s study [20] was the complex of relations between the family and the school system because of the disjuncture they felt in their role as working mothers and the expectations they sensed from the school. These puzzles led these institutional ethnographers to consider how particular corners of the
world were socially organized – that is, it brought their attention to a particular problematic.

4.1.1. Participation Study. In the participation study, one such puzzle emerged around participation. The project team espoused the importance of clinician participation and clinicians stated that it was important that their participation be more than just symbolic. However, despite these good intentions, one nurse commented about the Clinical Design Team, “We’re rubber stamping really.” (Interview 10) Another said, “I know that again the concept is that the design team will be a rubberstamping process and that the real work happens within the working groups” (Interview 3, Paragraph 57). The team, in very many ways, became a symbol of participation (the Clinical “Sales” Team, as one physician called it) more than a forum for real participation.

Many IS researchers may not recognize this as a puzzle – that participation may devolve to pseudo-participation has been well documented in the IS literature [21,22]. Yet, in this context, where participation was sincerely intended by both management and clinicians, it is not clear how participation became less than desired. The problematic for an IE re-interpretation of this research is to explore participation on the Clinical Design Team (CDT) and to map out how participation on this team was socially and institutionally organized.

4.1.2. Knowledge Management Study. In the Knowledge Management Study, the problematic emerged around how a new KMS was being used in practice. Despite genuine interest in the new technology by the Intellectual Property Group and their seeking to be first to use the technology in the firm, it was not clear how the actual use of the system became so different than originally intended.

The KMS was implemented to increase the transparency of documents across the entire organization, promote increased sharing, and reduce duplication while increasing overall collaboration. However, use of the system was delegated, perfunctory, or inconsistent with the original vision for the system. This was not because the group was against technology – they helped to bring the KMS to the firm and were seen as particularly IT savvy because of their work specializing in IT patents. Reflecting the sentiment of the entire group, the paralegal noted, “I think it’s appalling if we are not up on all the technological advances because I think it is just part and parcel and I think we should just be constantly learning and training ourselves with what’s new out there.” The puzzle that emerged, therefore, was how KMS use was so different than expected. As a result, the problematic for an IE re-interpretation of this study is to explore how the use of the Knowledge Management System in the Intellectual Property Group was socially organized.

4.2. Researching from the standpoint of the participant

The second key element of IE consists of exploring the phenomenon of interest from the standpoint of the individuals who enact it. Taking this perspective illuminates the phenomenon in ways that are otherwise unavailable to the researcher.

4.2.1. Participation Study. In the participation study, participant interviews were critical in seeing participation from the standpoint of participants. Relying only on observation portrayed participation in a managerial light, as being composed of only the activities sanctioned as “participation” in the context. Interviews with participants made it clear that participation was work that extended beyond these specific activities. One nurse, when asked about the CDT meeting times (every other Monday night from 5 pm to 7 pm), said,

[laughing] Well I think you sign up for things that you think is going to be within your work day and then it's not within your work day and it's outside of your work day and it goes on forever and I do..... there is interest courses and that and I can’t do them on Mondays and so it's at a point where I think I am not getting the right balance here and I think I’ve only missed one meeting. ... I suppose in some ways it allows me to finish my work here and go over there and I live in the [area] so it's kind of on the way home but I bus it and after that meeting my husband comes to pick me up, you know it gets late and it's cold and dark. I wouldn’t say I’m thrilled about the time but if it means that you get the wide representation then it's worth it ... (Interview 14, Paragraph 231)

We can see that, for this individual, participation is much more than just showing up at the meeting. Instead, it involves coordinating work with home time, arranging for transportation and choosing not to take courses that she otherwise might. It also means understanding that she views participation as important enough to participate despite these challenges.

A doctor who was also part of the CIS implementation explained why she found it difficult to prepare for the CDT meetings as the project team expected,

I think everybody is overworked, really, that’s what it comes down to and you have to tell yourself half the time, “I’m going to deal with this and I’m going to leave that alone”. I am working on a unit here where I will end up
with potentially ten patients at a time (a good number is six), so when you are dealing with six patients then you have time to do a whole lot of other stuff and you do have to do a lot of other stuff. You are either a workaholic and spend most of your life dealing with what’s going on here or you decide to have a life, do some stuff and go home in the evening and talk to your kids and be with your family kind of thing so that you end up deciding what’s right for you just what you’re going to do and deal with that, so there are limitations into how much I am going to get into what’s going on here. (Physician, Interview 12, Paragraph 161)

Like the nurse, this doctor shows that participation, for her, was more than just meetings. It was about balancing participation with patient care and administrative responsibilities and with family time. She makes clear that a limitation on her participation (and by inference on others’ participation) is in this coordination. By starting at the standpoint of the individual, we see participation differently; our view of participation is expanded beyond a series of meetings and work activities.

4.2.2. Knowledge Management Study. The study of KMS use focused on the perspective of the actual users of the technologies. Through a comprehensive site access agreement, the second author was co-located with the Intellectual Property Group and an ongoing presence within and occasionally outside the workplace. The researcher became a colleague who was able to span areas and discuss and observe actual use of the technologies directly and indirectly through the texts that they used and generated as part of their work.

Viewing the use of the KMS from this standpoint reveals a broad range of other considerations that had profound and material influence on how the KMS was used in practice. One of the more senior lawyers explained how he actually drafted the patent claims, pointing especially to the challenges posed by technology in supporting this key activity.

Actually drafting a patent, I find I do a lot of it on paper which is unusual because everything else I try to be paperless. But it is very difficult to have... you want to have drawings in front of you so that you are describing the picture with respect to the drawings. You need to have a numbers list or a parts list so you know all the different elements are and what number you have assigned to them so that when you are doing the detailed description you don’t have to dig around to try to figure out if it’s element 14 or 15. You will have a separate list for that. Then you probably have a pile of prior art as well to refer to as you are describing an element and then you will have the inventor’s disclosure in front of you as well so you actually... if you had seven computer screens in front of you that would work as well but in the absence of that it is very difficult.

The KMS was not the technology that the lawyer needed to facilitate this critical activity since many of the data sources were not in the KMS and the system did not assist with integrating the texts that it did contain. Ironically, this lawyer lamented that what he really needed to do a better job of drafting was a larger desk. This illustrates the importance of considering the perspective of what is actually being done as part of an individual’s work. Without starting at this standpoint, it might have been easy to miss the real challenges encountered by the lawyer.

4.3. Identifying the textual mediation in everyday work

Exploring lived experience, however, is not the ultimate goal of IE. Rather, institutional ethnographers are interested in showing how this experience is textually mediated. Therefore, data collection is focused on actively “listening for texts”.

4.3.1. Participation Study. Observation of individuals doing participation work identified a particularly important text – the decision request form (DRF). The DRF filled specific purposes. One was to document a recommendation from a working group to the CDT for their discussion and approval. Analysts on the project team also used the DRF to document an issue which they encountered as they were planning or doing configuration that they believed required clinician input. These decision requests were distributed to the CDT team members prior to the CDT meeting. Talking to people about their work as participants confirmed the importance of the DRF. One nurse explained that the DRF helped reassure her that the decision being requested of her (and the whole CDT) had gone through significant vetting.

When you [a working group] take it [a DRF] to CDT and say okay this is our decision request and it’s based on... At the table, there has been thought and conversations, and it’s not just one person saying this is the way it’s going to be. This is a very thoughtful process and allows a lot of input if you wanted to (Nurse, Interview 2, Paragraph 177)

Another nurse in talking about her work also spoke of the DRF,
I think that part of the process works well. They typically send out some decision requests ahead of time so I've got time to think about it and talk to my colleagues if necessary and go to the table with an opinion about what should be happening whether it's about what kind of view we should get when we first turn on the machine or whatever it is. Around the table, there is lots of opportunity for discussion and we do come to consensus on the final decision so I think it's a good process. (Nurse, Interview 8, Paragraph 111)

This nurse confirmed that she received DRFs prior to the meeting so that she could be prepare to “participate” on the issue. We can see that participation work – meeting preparation and what was discussed in meetings – was significantly organized by the DRF.

But the DRF’s coordination extended beyond this. In one particular case, the CDT had spent a reasonable amount of time discussing a DRF sent to them from a working group but time had run out (according to the meeting agenda, as set by the clinician engagement team). Eventually the project leader decided it was time to move on:

Project Leader: I propose a resolution that we accept this on the assumption that this has been well vetted.

Physician: But this is a fait accompli being presented. This is more than most people on a committee would allow. I would feel better if we understood who has vetted and the process. (Journal 20041025 Mtg 1 CDT)

Despite the physician’s protest, the DRF was accepted as written by the working group. This was not an isolated situation. One physician said:

I am not an expert in the area; no one is except those presenting and so now the decisions get rubber stamped I think because a lot of work's been done [by the working group] and you can see a lot of work's been done and you see it's been done well and you have no reason to say that, well, there's something wrong there. It seems like it's more like that now than it is that there are obvious areas to ... constructively criticize or make suggestions on (Physician, Interview 4, Paragraph 155)

That is, the DRF became a symbol that a lot of work had been done in deciding on the recommendation rather as a mechanism for ensuring vetting of the content of the decision. Therefore, DRFs, in the absence of sufficient discussion time, stood as a basis upon which to curtail discussion.

4.3.2 Knowledge Management Study. In the Knowledge Management Study, textual mediation was at the fore of the study. The interplay between the texts and the medium was critical for understanding the problematic of how the work was coordinated in the context of the actual use of the KMS.

While numerous texts were maintained as part of what was considered the case file, a key text that organized the practice of patenting across time and space was the draft of the patenting application. As described by a senior patent lawyer, the very nature of this drafting activity made it difficult to use the KMS as it was originally intended.

For a lot of people, I think the most difficult part of drafting patents is the precision required so if you are not doing it with everything in front of you there is a good chance you will need lots of re-work and that’s no fun. People that are really, really into details may enjoy that but very few people want to proofread the same sentence or paragraph four times, even if the last time they didn’t make any changes, to read it again. Very difficult. Best to be absolutely precise the very first time you do it and I find the only way to do that is to have everything in front of you so that you know exactly what the parts are number and you have to use the exact same terminology throughout, the same numbering throughout because as soon as you change the terminology now you have got a problem.

We can see the work of drafting a patent is textually mediated and those texts organize their work dramatically. Further, because of the demand for precision and the need to have so much information in front of them while doing the drafting, the lawyers prefer to manage these texts outside of the KMS.

4.4. Identifying Ruling Relations

The final key characteristic of IE is its ultimate goal, illuminating ruling relations. So how is this accomplished? Having identified texts that mediate and coordinate people’s activities, Institutional Ethnographers turn their attention to identifying how these texts coordinate local environments with the extra-local. Accomplishing this is done by following the texts from the local environment to identify how they are created and how they are used beyond the local.

4.4.1. Participation Study. In the Participation Study, we’ve seen that the DRF clearly organized participation activity in the local environment. Coordination with the extra-local environment was
evident in the creation of the DRF and in its use after approval by the CDT.

The creation of the DRF occurred outside the CDT group but how this happened was not clear to many on the CDT. One nurse commented,

*I did wonder about that and I would like more information about what the project team is discussing, like it’s very... for a while there I did not know that there was a project team. I thought we [the CDT] were it and so I didn’t know this but I did get a sense that at other meetings things were being discussed and decisions being made and then it’s like oh well this is decided at CDT, but I’m going, I haven’t missed a meeting and, no, it wasn’t it and so I thought this was decided outside of here. I thought someone decided this in a hallway conversation and then I found out there was this project team so I kind of felt like a puppet on a string so they are pulling the strings a bit here and we are the ones making the decisions and I’m supposed to feel part of that but I did feel some of that.*
(Nurse, Interview 2, Paragraph 307)

That is, there were clearly decisions being made outside the CDT forum (those that didn’t make it onto a DRF form). Further, for this nurse, her first thought was that these decisions would have been discussed in the CDT but they weren’t. The same nurse said,

*I wondered whether, by some of the things were brought that I didn’t think needed to be (I can’t think of an example of that either, sorry), is this to show us that they are bringing everything and this is why we are seeing some things that don’t need to be here or not, or is this just to lead us down that thought process?* (Nurse, Interview 2, Paragraph 307)

These quotes bring to light that participation was organized by these DRFs but there was an external process that determined what could become a DRF – a process to which most participants had no access and a process that some were not even aware of. Ruling relations are evident here – participation was not a free forum of discussion where all decisions would be discussed but carefully controlled.

Ruling relations were also evident in what happened with the DRF after it was approved by the CDT. On the form, was a “Review Process” field, which indicated other groups and individuals who would need to “review” an accepted recommendation. This field connected participation into a larger institutional complex in which others could question or overturn a decision that had been made. What was the process by which this occurred?

In one case, a working group recommended delaying the implementation of allergies until a later project phase. The main reason for this recommendation was that allergies already had to be recorded in at least two other places; because the new CIS was not replacing the paper chart, requiring allergy entry into the new system would simply add to the data entry. Nurses (generally) felt this would increase their work load and could represent a patient safety issue if the data entry was not reliably repeated in all necessary places. The DRF went to the CDT, where it received CDT approval after some discussion. However, a physician who disagreed with the decision escalated the issue to the project team, who then took the DRF to the project steering committee. The argument against the delay was that it would lead to the emergence of different ways of entering allergy information that would threaten an eventual global standard and create patient safety issues if clinicians didn’t have a standard place to find allergy information. The CDT decision was overturned. The project director informed both the working group and the CDT that the decision had been overturned and gave the groups an opportunity to comment. However, it was clear that a decision had been made and no discussion ensued.

This example demonstrates the coordination of the DRF outside the CDT group. Approved DRFs were circulated to other organizational groups for review and decision. However, it was clear that decisions that were overturned outside the CDT forum did not (necessarily) come back to the CDT as a new (or rejected) DRF. Other more minor issues did get sent back to the CDT for review. A complete IE study could follow the DRF to determine how it was decided that a CDT-approved DRF would be rejected and whether this rejected DRF would go back to the CDT for discussion. Regardless, that groups outside the CDT could reject approved DRFs without CDT consent speaks to the ruling relations in the environment; the CDT was really a first authority on deciding configuration issues not the final authority.

4.4.2. Knowledge Management Study. In the Knowledge Management Study, contribution to the KMS became a delegated task to junior lawyers and paralegals that served only to maintain the perception that the Intellectual Property Group was using the system. The senior lawyers spent more time circumventing the use of the system than they did actually using it. Thus, to understand how they went from enthusiastic early adopters of the technology to covert subverters, the interplay between what the lawyers actually did in their daily work and the ruling relations must be considered. The senior lawyer described the situation,
5. Discussion and conclusion

In addition to outlining how an IE would be undertaken, these studies have highlighted the strengths that IE can bring to IS research. First, IE research starts from the standpoint of people’s everyday lives and in doing so illuminates research topics in new ways, destabilizing how we previously interpreted and defined the research phenomenon. In the participation study, an IE re-interpretation demonstrates that participation is much more than the managerial and technical view of participation, which portrays it as a series of meetings and interactions between users and system analysts. Both the nurse and doctor explained that “participation” for them included coordination with transportation, other work duties, and home life. In the Knowledge Management System, we see that technology use arose from a complex interplay between the practice and institutional life in which that use was experienced.

Taking this standpoint provides more than just context to the research; instead, it makes visible organization that might otherwise be missed. The nurse tells us that she coordinates her participation with a concept, “wide representation”, which pushes her to participate despite the personal challenges it entails. The doctor tells us that her participation (her review of DRFs prior to the CDT meetings) is limited by her coordination of this work with her other activities. By foregrounding what was actually done with the KMS, we were able to map how the lawyers who were the early adopters of the technology slowly drifted away from daily use of the system to delegating it to their juniors or providing only perfunctory use to continue to feed institutional perceptions that the system was being used. Once identified, the IE researcher can pick up these threads of organization to explore the extra-local environments in which these texts are both created and used, in order to reveal the ruling relations with which the local environment coordinates.

Second, IE allows IS researchers to explore the social without resorting to “blob-ontology”. In the original participation study, one of the findings was that “organizational relations of power” interfered with full communication (as defined by Habermas [12]). Yet, because of the methods and theory used, how this came to be was not well detailed. By following an approved DRF and seeing that it could be overturned without ever coming back to the CDT, an IE interpretation of this data fills in what “organization relations of power” means – a web of interactions that provided little real sway to the CDT. In the knowledge management study, several structures such as “time-based billing” were implicated in the failure to adopt the knowledge management system. Our IE
interpretation of the data demonstrates that “time-based billing” was a ruling relation -- a complex web of coordination to which individuals organized their activity. IE provides a way of mapping out the social and demonstrating how things happened the way they do.

At the same time, this “mapping out” of how things happen links the “micro” with the “macro” (though institutional ethnographers would use the terms “local” and “extra-local”). IE shows how the local environment is coordinated by and with actions and interests in the extra-local environment. Of particular interest are the trans-local complexes of relations that flow across multiple local environments; these are the “ruling relations” to which Smith refers. It is here that IE claims its form of generalizability:

No institutional ethnography is a case study; each is an investigation of the ruling relations explored from a given angle, under a given aspect, and as it is brought into being in people’s everyday work lives. Generalization from a particular study is not a matter of populations or even just the forms of standardization and generalization that institutions themselves produce and reproduce; it is, more important, an effect of the ruling relations themselves – that they are interconnected in multiples ways as well as deeply informed by the dynamic of capital accumulation [5:219]

We do not suggest that IS researchers jettison their current research approaches to take up IE; not all research topics are suited to an IE investigation. As demonstrated here, topics such as IS implementation and adoption provide ample opportunity to apply IE. In these areas, understanding how social and institutional organization impacts these processes has the potential to move our understanding of these topics further. As well, IEs might be undertaken to explore information technology as a textual mediator of activity. In fact, Moser [23] calls information technology a superpower of textual mediation in today’s world.

Like any research method, IE is not without its critics. One category of critiques relates to IE’s use of experience as data. As would many post-structuralists and postmodernists, Scott [24] argues that experience is not “pure”; how it is accounted for and understood is inextrically linked up with the historical and current contexts of those who recount and remember an experience and those who hear and write it. Therefore, experience cannot be seen as real, making IE’s reliance on this data as problematic. Institutional ethnographers respond that IE’s focus is not on reporting these experiences as reality but instead as entries into the institutional and social relations with which and by which these experiences are organized [25,5].

IE emerged out of a desire to create an alternative to traditional sociology, an alternative which preserves the subject so that he or she does not disappear in and through the sociologist’s theorizing. Walby [26], however, points out that IE is not immune to this problem. Institutional ethnographers have a particular perspective which conditions what they see, hear and record and determines what is afforded ontological status (the social, as the ongoing coordination of a person’s activities with others [5]) and what is not. As a result, he cautions institutional ethnographers that they must continue to practice a strong reflexivity in their research practice to avoid, or at least mitigate, this problem [26].

Despite these cautions, IE provides a new lens through which IS researchers can view established themes and recognize new insights, by asking questions or reinterpreting findings that are made visible through an IE perspective.

6. References


