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## Institutional Ethnography as a Method of Inquiry: A Scoping Review

**Abstract** The purpose of this scoping review is to examine the extent, range, and nature of the use of institutional ethnography (IE) as a method of inquiry in peer-reviewed journal publications. Fifteen databases were searched between the years of 2003 and 2013. Relevant data were extracted from 179 included articles.

Findings relate to nine key areas including year of publication, authorship and geography, types of journals, format of resources, authors' descriptions of how they used IE, approaches used in conjunction with IE, data collection methods, standpoint, and institutional relations. Institutional ethnography was diversely conceptualized as: a (sociological) method of inquiry, methodology, research approach, feminist sociology, theory and methodology, framework, lens, field, perspective, and form of analysis. Inevitably, authors applied IE differently across their research and writing, ranging from direct usage or close adherence to IE in a comprehensive manner; to indirect usage or loose adherence to IE by drawing on it as inspiration, guidance, or influence; or borrowing from a certain facet of IE such as a particular theory, concept, method, tool, or analytic strategy. Additionally, some authors adapted IE to suit a specific purpose, which entailed using modified versions of IE to fit a given context or objective, while others strived to extend existing understandings of IE through critique, explanation, review, elaboration, or reflection.

The results from this study are useful to both beginning and experienced institutional ethnographers, as the insights gained provide clarity about the use of IE, identify trends in its application, and raise additional questions.

**Keywords** Institutional Ethnography; Method of Inquiry; Scoping Study; Standpoint; Institutional Relations

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Developed by Canadian sociologist Dorothy Smith (1987; 1990; 1996; 2003; 2005; 2007; 2008), institutional ethnography (IE) is an established, formal, empirically based, and scholarly alternative sociology (Mykhalovskiy and McCoy 2002). Dorothy Smith's (2005:1) seminal text *Institutional Ethnography: A Sociology for People* "explicates institutional ethnography as a sociology that translates that concept into a method of inquiry" with distinct ontological orientations, theoretical influences, and guiding concepts. At its core, IE uncovers the social organization of knowledge through its materialist method for mapping out what happens to people, and operates under the assumption that social organization occurs through texts (Campbell and Gregor 2002).

Institutional ethnography uncovers and attempts to help others understand the relations that orga-

nize individuals' experiences, and is based on the notion that people participate (both knowingly and unknowingly) in processes of organization of their lives (Smith 1987; 1990; 1996; 2005). This feminist inspired "sociology for people" requires a move in thinking towards what Dorothy Smith (2005:209) has called "the ontology of the social...; meaning that what institutional ethnography is aiming to discover really happens or is happening, and it can be explored and explicated."

Grounded in a Marxist-feminist approach (Smith 1996), Dorothy Smith rejects the dominance of theory and takes up "standpoint" as an orienting concept guiding the inquiry. Her use of "standpoint" serves as a point of entry into the social that "does not subordinate the knowing subject to objectified forms of knowledge of society" (Smith 2005:10). IE

“is a method of inquiry that works from the actualities of people’s everyday lives and experiences to discover the social as it extends beyond experience” (Smith 2005:10).

“Institution” in an institutional ethnographic sense does not denote a physical organization or an establishment such as a school or hospital, but rather serves as an abstract reference to an embodied complex of “ruling relations that are organized around a distinctive function such as education, health care and so on” (Smith 2005:225). Organized by texts, ruling relations are the complex practices that coordinate people’s actions locally and “translocally” in ways that people are often not fully aware of (DeVault and McCoy 2006). Although the ethnographic research may begin with their experiences within an institutional setting, people’s experiences are not the objects of inquiry; rather, aspects of the institution that are pertinent to the organization of people’s experiences comprise the focus of the investigation (Smith 2005). The institutional dimension of institutional ethnography guides the researcher’s analytic move from the local ethnographic description to the explication of the ruling relations that coordinate people’s knowledge and activities (Rankin and Campbell 2009).

The inspiration for this scoping study emerged from our (the three authors’) individual experiences applying IE as a method of inquiry within our own research projects. Despite coming from different disciplinary backgrounds and academic settings, we share the belief that IE is being utilized with increasing frequency, and is taken up in varying ways. We also recognize the existence of debates and dif-

fering perspectives regarding the methods and approaches that are more or less congruent with IE. The purpose of this review is to apply Arksey and O’Malley’s (2005) scoping study methodology to explore the extent, range, and nature of the use of institutional ethnography (IE) as a method of inquiry by systematically mapping various features of IE publications from peer-reviewed literature.

To accomplish the aforementioned objective, we identify key concepts, approaches, and methods employed by institutional ethnographers. Our aim is to establish the types of IE research published, and to provide an overview of how IE has been applied. In doing so, this study will build upon existing understandings of this method of inquiry, highlighting key trends, questions, and gaps. To our knowledge, this is the first comprehensive review of the use of IE on an international scale. Recently, an occupational therapy-specific IE scoping study was published in a non-blind, peer-reviewed professional magazine (Carrier and Proding 2014). A large-scale review such as the one we have undertaken is important, as it records a vital part of IE history and chronicles the method as it has spread globally and across disciplines. Understanding how IE is being conceptualized, employed, and written about can inform professional and scholarly institutional ethnographic practices, identify notable tensions, and signal avenues for continued exploration. Moreover, it may reassure novice institutional ethnographers to know that others encounter similar challenges and questions, and support their grasp of relevant orienting concepts and methods. Our intention for this study is to encourage scholars, researchers, and other IE practitioners to find supportive spaces and

opportunities to make meaningful contributions within the diverse and vibrant institutional ethnographic community.

The scoping review method is congruent with our quest to understand the varied usages of IE. Both scoping reviews and institutional ethnographies (a) recognize mapping as a useful analytical device, although how they employ mapping differs (e.g., Arksey and O’Malley 2005; Smith 2005); (b) utilize similar terminology to label their approach to analysis, such as “‘descriptive analytical’ method” (as stated by Arksey and O’Malley 2005:26), and “analytic description” (as stated by S. Turner, personal communication, June 17-24, 2011); and (c) receive calls from the research community to make the details of their analytic processes visible and accessible to others (e.g., Levac, Colquhoun, and O’Brien 2010; Walby 2013).

### Methodology: Process Challenges of Conducting an IE Scoping Study

This scoping study follows the protocol set forth by Arksey and O’Malley (2005), incorporating the recommendations for enhancing the methodology suggested by Levac and colleagues (2010). Moving through the six stages of this framework (as described later in this section), we summarize features of studies included in the review, and organize key characteristics systematically. The irony of categorizing and organizing the content of IE studies is not lost on us. There are inherent tensions in applying a primarily quantitative method that relies on “arbitrary and reductionist categorizations to explore qualitative research” (O’Shaughnessy and Krogman 2012:504). We would be remiss, if we did

not openly acknowledge some of the challenges and incongruities that surface and share our strategies for reconciling these differences.

Specifically, the work of conducting a scoping study involves coding, categorizing, and reduction (Arksey and O’Malley 2005), which contrasts with how institutional ethnographers do research (Campbell and Gregor 2002). For example, we found it challenging to code or categorize complex, multi-dimensional information central to institutional ethnographies, such as “standpoint.” Campbell and Gregor (2002:16) state that IE “takes the standpoint of those who are being ruled.” Identifying and retaining a standpoint is critical to the practice of IE (Smith 2005; Bisailon 2012). It is an orienting concept that gets at the intricacy of people’s multi-layered or intersecting identities, which shapes how they see and understand the world. To depict the range of standpoints across the articles, we chose a visual mapping schema (Word Cloud) reflective of a mode of description and analysis that is more in keeping with institutional ethnography than a quantitative representation of standpoint such as a numerical table. Institutional ethnographic work is critical of institutional forms of power that tend to “objectify” complex people through the use of narrow, inflexible categorizations (Smith 2005). In the spirit of preserving human diversity and utilizing inclusive language, we are mindful that the people whose perspectives and experiences form the “starting point” for the research (Bisailon 2012:619) are more than the labels often ascribed to them.

Designing our data extraction chart, drafting the manuscript, and attending to feedback from

expert consultants involved an iterative approach to (a) clarify the utility of the findings, (b) contemplate potential reactions from a diverse readership, (c) adhere to the journal's publishing guidelines, and (d) remain committed to preserving our own interests and voices. Ultimately, we sought to strike a delicate balance between integrating orienting concepts from IE, utilizing terminology associated with methods of inquiry, and employing procedures consistent with scoping reviews, which necessitated ongoing negotiation, prioritization, adaptation, and compromise.

As our inquiry evolved, so too did our working protocol. Consideration was given towards project feasibility and complexity, as well as available resources and expertise. We found ourselves supporting Daudt, van Mossel, and Scott's (2013:35) suggestion to "remove the term 'rapidly' and replace it with the need for scoping studies to be done thoroughly and thoughtfully," as this kind of work "take[s] time." Refining multiple iterations of charts, procedures, and operational definitions proved tedious, but necessary, given our requirement to develop a unified language and process. We necessarily modified procedures in an effort to troubleshoot difficulties, set reasonable limits, and maintain momentum. The initially projected 1-year, 2-person side-project turned into a 3-year, 3-person research collaboration.

Our literature search proved challenging; upon consultation with library services, we realized that certain search terms we hoped to include (e.g., mapping, problematic, feminist, and sociology) were extremely broad and would yield numerous

false positive results. Thus, we refined our list of terms by utilizing key words identified by authors familiar IE articles (for example, Campbell 2003; Pence and McMahon 2003; Rankin 2009; Bisailon 2012). Although we originally left certain search parameters open-ended, such as the year and type of source, which is typical practice for scoping reviews (e.g., Pham et al. 2014), after retrieving tens of thousands of hits, we determined that conducting a more focused investigation was in order. Given our resource constraints, we limited our sources to one decade, which mirrored a number of recently conducted scoping reviews (e.g., Redvers et al. 2015; Watson, Zizzo, and Fleming 2015; Webster et al. 2015). The 2003-2013 timeframe was selected because it represents a pivotal decade in the development of IE. Dorothy Smith's seminal text was published in 2005, thus providing us with a period that would reflect the impact of this work; as well as a solid indication of recent trends in, and contemporary usage of, IE. We further restricted our charting to peer-reviewed journal articles, a strategy occasionally employed by other scoping reviewers (Pham et al. 2014). Given the frequent comments we heard from institutional ethnographers (at conferences, in workshops, via feedback, and during informal conversations) of the challenges they face getting their work published in peer-reviewed journals, we opted to explore this rich source as the basis for the review. Our assumption was that authors would likely face similar difficulties navigating the web of ruling relations associated with academic publishing (i.e., journals' specific word count, format, and structure regulations; the peer-review process; and the inevitability of having to explain their work to both IE and non-IE audiences). Peer-reviewed jour-

nal publications provided us with fruitful grounds for drawing comparisons. However, journal publications may not always reflect cutting edge, or innovative information in a given field; thus, our scoping review provides only a partial view of how IE has been taken up as a method of inquiry. Nevertheless, we hope that our findings will generate rich discussion and debate.

We followed the five stages of Arksey and O'Malley's (2005:22) framework, which entailed: (a) identifying the research question; (b) locating relevant studies; (c) establishing study selection criteria; (d) charting the data; and (e) collating, summarizing, and reporting results. We also included the optional sixth stage of consulting with experts.

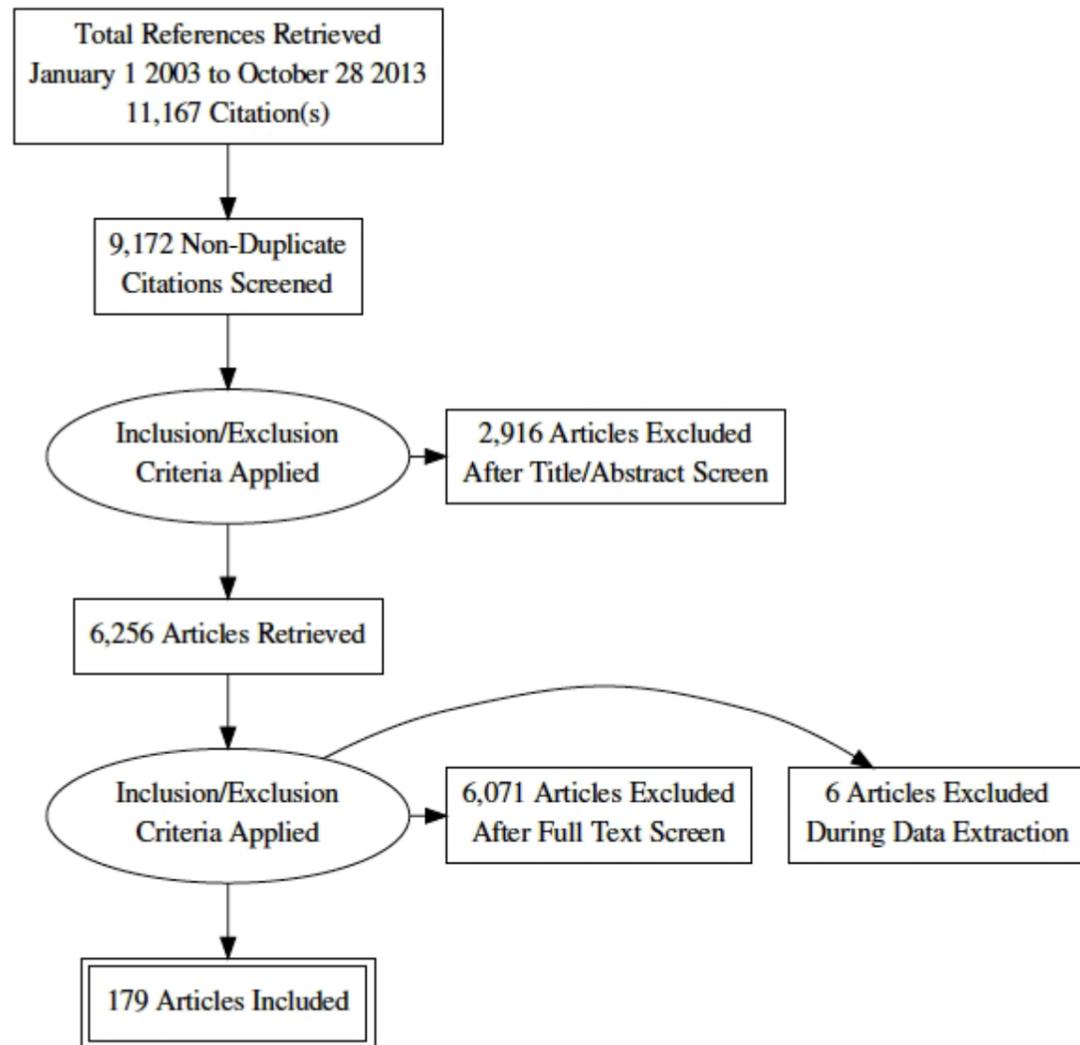
Stage 1 of the framework requires the development of a clear research question that will guide the scope of inquiry (Levac et al. 2010). In seeking to better understand the uptake of IE, we posed the following research question: *What does the existing peer-reviewed published literature tell us about the extent, range, and nature of the use of IE as a method of inquiry?*

Stage 2 involved identifying relevant studies through a systematic review of the peer-reviewed literature published between January 1, 2003 and October 28, 2013. Specifically, we used (a) the OvidSP search platform in the following five databases: MEDLINE, EMBASE, and EBM Reviews—Cochrane Database of Systematic Reviews, PsycINFO, and ERIC; (b) the EBSCOHost search platform in the following two databases: CINAHL and H.W. Wilson Social Science Abstracts; and (c) the ProQuest search platform in the following eight databases: Arts & Humanities

Full-Text, Canadian Research Index, PAIS International, Philosopher's Index, ProQuest Social Science Journals, Social Services Abstracts, Research Index, and Sociological Abstracts indexed. To ensure comprehensive coverage of the literature, we also conducted a Summon platform search. Combinations of database-specific and free-text terms were used in the search. All searches contained variations of terms utilized frequently in institutional ethnography, including "institutional ethnography," "ruling relations," "text-mediated," "disjuncture," "visible/invisible," "social ontology," "shape/shaping," "intertextual/intertextuality," and "organization/organizational."

The search retrieved a total of 9,172 references (including the references that were identified by hand searching IE-related special issues of relevant journals, and reviewing the reference lists of the articles that met our inclusion criteria, as well as a random assortment of 30 journals that were likely to publish IE articles). All references were saved in an Endnote library, which was then used to identify and remove the 2,916 duplicates. The remaining 6,256 unique references were reviewed against the inclusion criteria described below. A total of 5,992 articles were excluded after the title and abstract screening. We retrieved 265 full-text articles against which the inclusion and exclusion criteria were applied. Eighty articles were excluded after the full text screening, and six articles were excluded during data extraction; resulting in a total of 179 included articles that became part of the final review (see: Figure 1 for a Flow Diagram depicting the flow of information through the different phases of the review).

Figure 1. Flow Diagram of Review.



Source: Self-elaboration.

When locating the studies for inclusion during Stage 3, two of the researchers independently reviewed all titles and abstracts for prospective inclusion. The reviewers met at the beginning, midpoint, and final stages of the review process to discuss challenges and refine the search strategy as required. Disagreement arose in relation to nine specific studies; therefore, a third reviewer deter-

mined final inclusion. In order for an article to be included within the study, it must have (a) referenced at least one work by Dorothy Smith, (b) explicitly used the term “institutional ethnography,” (c) applied IE as a method of inquiry or advanced the approach, and (d) been published between January 2003 and October 2013. Sources not (a) written in English, (b) available in full-text, or (c) published

in journal article format were excluded from the review.

It should be noted that some of the omitted articles appeared to use IE-consistent terminology, approaches, strategies, and sources; yet the authors did not label their work as IE, or acknowledge explicitly that they were drawing on aspects of IE. Other excluded articles made reference to IE, but did not cite Dorothy Smith; thus, these sources were also left out of the review. We maintained a consensus that the inclusion of these basic elements (such as referencing Dorothy Smith’s work) were integral and would allow for cross comparison of the included publications.

When charting the data in Stage 4, we utilized an Excel spreadsheet to identify key items of information obtained from the primary source under review. This technique for synthesizing qualitative data included sifting, charting, and sorting material according to the following key categories: year of publication, number of authors, journal of publication, country of primary author, country of co-author(s), geographical location of research/interest, format of resource, author explanations of how IE is being employed in their work, methods of inquiry and other approaches used, data collection methods, standpoint, and institutional relations under investigation. The data chart was refined multiple times in an iterative fashion with the project’s purpose and research question in mind to ensure extraction of the information necessary to fulfill the study’s objective.

Due to the difficulties inherent in coding such diverse information, we relied on operational defini-

tions to standardize the criteria for data extraction. These definitions were generated by reaching consensus, and by applying our own working knowledge and judgment of the key criteria. There were several challenges in extracting relevant data from the articles connected to the divergent uses and intended meanings of IE-related terminology. For example, some authors did not take up a standpoint within their work, while other authors cited multiple standpoints from a variety of perspectives and positions of power. Furthermore, there were some sources that examined numerous institutional relations, or the intersections between them, making categorizing and coding these relations impractical.

After the data extraction stage was complete, information was collated. We recount the comprehensive sense-making process we employed for one specific data column below, in order to provide an example of our methodological and analytic work.

Contents from the data extraction chart column related to “other approaches used” were itemized in list form. Items were then organized into connected clusters. The iterative, messy, and tentative process of grouping related items involved making continuous refinements by readjusting category labels and shifting contents. Various books and online resources were consulted (e.g., Campbell and Gregor 2002; Creswell 2005; 2007; Denzin and Lincoln 2005; Smith 2005; Schwandt 2007) as we operationally defined categories and developed a working understanding of other approaches used in combination with institutional ethnography. Schwandt’s (2007) *Sage Dictionary of Qualitative Inquiry* (3rd ed.) proved to be a particularly valuable source. For a list of our operational definitions, please refer to Table 1.

Table 1. Operational Definitions for Other Approaches Used with IE.

TERM(S)	DEFINITION(S)
Concepts	A concept “point[s] the inquirer in a general direction but do[es] not give a very specific set of instructions for what to see” (Schwandt 2007:292).
Theories, perspectives, philosophies, or ways of knowing	According to Schwandt (2007:292), “a theory is a unified, systematic causal explanation of a diverse range of social phenomena.” Schwandt (2007:292) goes on to state that: “A step up the ladder of sophistication, one finds theoretical orientations or perspectives (e.g., functionalism, symbolic interactionism, behaviorism...). These, more or less, are social theories that explain the distinguishing features of social and cultural life, and thus, they serve as approaches to identifying, framing, and solving problems, and understanding and explaining social reality.”
Methodologies or research traditions	A methodology or research tradition encompasses: “a theory of how inquiry should proceed. It involves analysis of the assumptions, principles, and procedures in a particular approach to inquiry (that, in turn, governs the use of particular methods)...[It] occupies a middle ground between discussions of method (procedures, techniques) and discussions of issues in the philosophy of social science...[It] defines the object of study and determines what comprises an adequate reconstruction of that object” (Schwandt 2007:193).  Some examples of methodologies include: quasi-experimental, survey, ethnomethodology, grounded theory, case study, social phenomenological, ethnographic, naturalistic, and narrative (see: Creswell 2007; Schwandt 2007).
Analytic approaches and procedures	The “activity of making sense of, interpreting, and theorizing data...a variety of procedures that facilitate working back and forth between data and ideas” (Schwandt 2007:6).  Some examples of analytic approaches include: constant comparison method, analytic induction, and grounded theory analysis (Schwandt 2007).

Source: Self-elaboration.

Through the process of further (a) consulting multiple original articles to see how authors defined and employed specific approaches, (b) sub-grouping and counting related approaches, (c) eliminating redundant items that were an obvious part of institutional ethnographic or qualitative research practice, and (d) dropping outliers, eight initial categories were distilled to the following three categories:

- Theories, perspectives, frameworks, ways of knowing, guiding concepts, and models;
- Methodologies or research traditions; and
- Analytic approaches and procedures.

Although there were numerous ways that the approaches could have been clustered, the focus of our scoping review (exploring the use of IE as a method of inquiry) directed our gaze to research-oriented categories that would best enable us to answer particular facets of our research question. Each member of the team independently reviewed the draft Table (including its categories and contents) using both operational definitions and expert judgment as a guide. Discrepancies were identified and discussed collaboratively in order to reach an agreement.

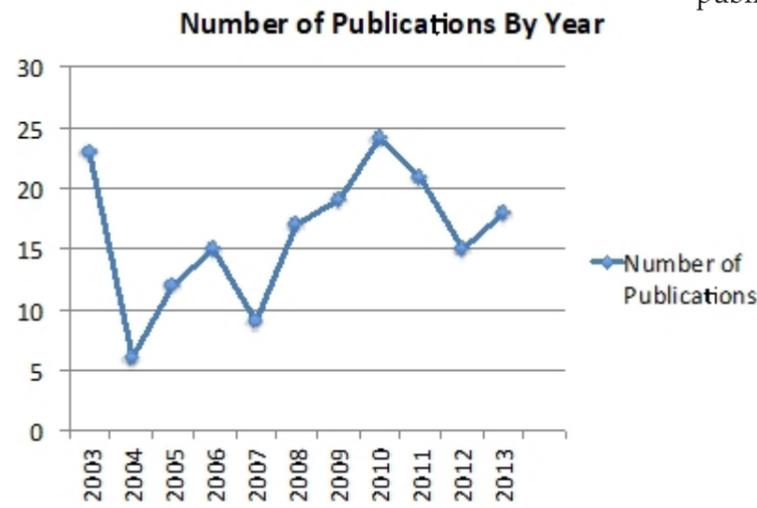
Three challenges arose while attempting to categorize approaches. Firstly, some authors provided very general information about the additional approaches they used, while other authors provided very detailed information. When comparing and contrasting available approaches, we realized that multi-leveled groupings would be

required to accurately cluster connected items. Secondly, encountering contested terms including contradictory definitions, labels, or understandings within and across the various resources we consulted made it difficult for us to pinpoint within which category a particular item best fits. It became apparent that like institutional ethnography, certain approaches could have easily fit across multiple categories, as they had theoretical, methodological, and analytic underpinnings. In such instances, we strived to place the approach within the category that most closely mirrored how the author(s) defined or used it. Thirdly, there were inherent tensions involved in coding or categorizing these data, as such reductive practices are typically not regarded as consistent with IE approaches to analysis (Campbell and Gregor 2002).

## Results

One hundred seventy-nine peer-reviewed journal articles published between January 1, 2003 and October 28, 2013 were included in the review. Interestingly, between 2003 and 2004, and again between 2006 and 2007 there was a significant drop in IE publications; however, between most other years there was an increase in the number of IE journal articles (see: Figure 2 for details). It is important to remember that IE researchers are also choosing to publish their works in other formats such as books or edited book chapters. Since such sources were excluded from our scoping study, we cannot speak to the broad trends across the diverse landscape of IE literature.

Figure 2. Number of Publications by Year.



Source: Self-elaboration.

### Authors and Geography

The majority of the publications in the review were single authored papers (93, or 52%) (e.g., Good-Ginrich 2003; Jung 2003; Mykhalovskiy 2003; Rusted 2006; Walby 2006; Nichols 2008a; Quinlan 2008; Hicks 2009; Fisher 2010; MacKinnon 2010; Bisailon 2011; Deveau 2011; Murray 2012; Ross 2013). There were fewer publications with large numbers of authors and as the number of authors increased, the number of publications decreased. Specifically, 48 (27%) of the publications had two authors (e.g., Jakubec and Campbell 2003; Scott and Thurston 2004; Luken and Vaughan 2005; MacKinnon and McIntyre 2006), 19 (11%) had three authors (e.g., Berkowitz, Belgrave, and Halberstein 2007; Lane, McCoy, and Ewashen 2010; Malinsky, DuBois, and Jacquest 2010; Braaf, Manias, and Riley 2013), 12 (7%) had four authors (e.g., Sadosky et al. 2010; Marshall et al. 2012; Mumtaz et al. 2012; Moll et al. 2013), and only seven IE publications (4%) had five or more

authors. This trend may reflect discipline-specific publishing practices. For instance, five of the seven papers with the most authors were related to healthcare issues in religious, nursing, midwifery, and occupational therapy contexts (Townsend et al. 2006; Hamilton et al. 2010; Kennedy et al. 2010; Muñoz-Laboy et al. 2011; Sinding et al. 2012). In healthcare settings, mixed methods are often employed, large inter-institutional investigative teamwork is prevalent, and co-authorship practices that acknowledge the involvement of all stakeholders remain the norm. Another two articles were related to health and transitional issues in educational contexts (Aldinger et al. 2008; Restoule et al. 2013) where collaborations between members of universities, schools, communities, or unit partners frequently occur. Four of the seven articles involved international collaborations. Interestingly, each of these articles had at least one author affiliated with the United States. Other countries represented across the international collaborations included Brazil (Muñoz-Laboy et al. 2011), Canada (Hamilton et al. 2010), China (Aldinger et al. 2008), and England (Kennedy et al. 2010). The remaining two articles involved national collaborations between individuals with Canadian affiliations (Townsend et al. 2006; Sinding et al. 2012).

Primary authors on 150 (or 84%) of the articles had North American institutional affiliations. More specifically, 106 (or 59%) of these articles identified the first author as holding a Canadian institutional affiliation, and 44 (or 25%) identified the first author as being affiliated with an American institu-

tion. Subsequently, first authors on eight (or 5%) of the articles held institutional affiliations from the United Kingdom, and first authors on seven articles (or 4%) had affiliations from Australia. There were five publications (or 3%) with primary authors from Scandinavia, including Finland (Husso and Hirvonen 2012), Norway (Widerberg 2004), Sweden (Nilsson et al. 2012), and Denmark (Høgsbro 2010). The remaining primary authors were affiliated with institutions in South America—Brazil (Gómez and Kuronen 2011); Africa—Nigeria (McNamara and Morse 2004); or Western-European countries—Austria (Prodingler et al. 2012), Switzerland (Prodingler and Turner 2013), and the Netherlands (Klaver and Baart 2011).

To better understand the geographical location of (a) the research, or (b) interest, we grouped the articles according to Global North and Global South designations. Global North included North America, Western Europe, and developed parts of East Asia; whereas Global South was comprised of Africa, Latin America, and developing Asia, including the Middle East. In total, 14 journal articles (8%) were based on work completed in the Global South, including research conducted in countries such as Ecuador, Guatemala, Kyrgyzstan, Brazil, Pakistan, Nigeria, and South Africa. Of the 14 articles, only three (2%) had first authors from the Global South (one of which was the sole author, while the other two papers had co-authors from the Global North).

### Types of Journals and Format of Resources

Out of the 179 articles, 59 (or 33%) were published in health-oriented journals (e.g., Paterson,

Osborne, and Gregory 2004; Lynam 2005; McCoy 2005; Winkelman and Halifax 2007; Mykhalovskiy 2008; Limoges 2010; McGibbon, Peter, and Gallop 2010; Rankin et al. 2010; Sinding 2010; Godderis 2011; Veras and Traverso-Yeppez 2011; Lowndes, Angus, and Peter 2013; Melon, White, and Rankin 2013), followed by 40 (or 22%) in sociological journals (e.g., Cleeton 2003; Luken and Vaughan 2003a; 2003b; Knaak 2005; Harrison 2006; Parada, Barnoff, and Coleman 2007; Leonard and Ellen 2008; McNeil 2008), and 15 (or 9%) in education journals (e.g., Salmon 2007; Comber and Nixon 2009; Hamilton 2009; Nichols and Griffith 2009; Shan 2009; Comber and Cormack 2011; Maher and Tetreault 2011; Comber 2012). The remaining 65 (or 37%) articles appeared in journals that addressed various facets of policy (e.g., David 2008; Barry and Porter 2012), youth (Pence and McMahon 2003; Kushner 2006a; Nichols 2008b), social work (Kushner 2006b; Hicks 2009; Pozzuto, Arnd-Caddigan, and Averett 2009), aging (e.g., Brotman 2003), law (Goodman 2008), geography (Perreault 2003; McNamara and Morse 2004), agriculture (Tarasuk and Eakin 2005; Eells 2010), ethics (Truman 2003; Fisher 2006a; 2006b), communication (LaFrance and Nicolas 2012), and management (Lund 2012). The *Journal of Sociology and Social Welfare* was the most prolific publisher of IE articles (n=10; including a special edition with nine IE publications in 2003); followed by *Nursing Inquiry* with six publications; and *Gender, Work, and Organization* with five publications.

The most prevalent formats of papers included empirical research, followed by conceptual papers and experiential pieces. One hundred thirty-one articles (73%) were based on empirical research (e.g.,

Townsend 2003; Luken and Vaughan 2006; McCoy and Masuch 2007; MacKinnon 2008; 2011; 2012; Lane 2011; Maher and Tetreault 2011), while 12 articles (7%) fell into the category of conceptual papers, meaning that IE was utilized to explore issues, and to develop concepts and ideas (e.g., Smith 2003; DeVault 2006; Walby 2013). Cumulatively, the educative resources (e.g., David 2008; Deveau 2008; Quinlan and Quinlan 2010) and experiential pieces (e.g., Grahame and Grahame 2009; Janik-Marusov et al. 2011; LaFrance and Nicolas 2012) accounted for 22 of the publications (with 11 publications or 6% each). Refer to Table 2 for operational definitions pertaining to the 7 formats of reviewed resources and their respective percentages.

Table 2. Operational Definitions for Format of Resource.

FORMAT OF RESOURCE	#(%) OF ARTICLES
Empirical research— <i>draws on data generated from direct and indirect observation(s) or experience(s) that are analyzed quantitatively or qualitatively to make a claim</i>	131 (73%)
Conceptual— <i>provides explanations and accounts of IE and its development; uses IE as a framework to explore issues, develop concepts and ideas; may draw upon empirical research based on IE approaches to support an argument, but the primary objective is not to report on findings</i>	12 (7%)
Educative resource (e.g., toolkit)— <i>provides clarification of, or assistance with, EXISTING theories, concepts, or approaches in order to help others learn how to think, write, or research in a particular way</i>	11 (6%)
Experiential account— <i>Relating to, or derived from, experience</i>	11 (6%)
Advancing IE theory/methodology/analysis— <i>presents a NEW perspective or practice that alters, modifies, or extends existing work</i>	5 (3%)
Literature review— <i>an evaluative report of information found in the literature pertaining to IE</i>	5 (3%)
Social critique— <i>a critical analysis, argument, or commentary about contemporary social life, or social organization, which points out existing flaws, challenges, or problems in society</i>	3 (2%)

Source: Self-elaboration.

### Authors' Descriptions of How They Used IE

As IE has evolved and grown exponentially across disciplines, it has been taken up variably (a) as a sole approach/methodology, (b) as a guiding framework or foundation, (c) in combination with other methods, and (d) in other ways that are uncovered later in this review. To get a snapshot of how authors described and used IE, we extracted from the articles the specific phrases related to explanations or descriptions of how authors drew on IE in their work. The phrases were then categorized as indicating one of the following: directly using IE; indirectly or loosely adhering to IE; adapting IE to suit authors' own purposes; extending authors' own and others' understandings of IE; and finally, drawing from IE studies.

Authors mostly described IE as "an approach" (e.g., Yan 2003; Campbell and Teghtsoonian 2010; Mumtaz et al. 2012; Bruch 2013), "a methodology" (e.g., Rankin 2003; Medves and Davies 2005; Parada, Barnoff, and Coleman 2007; McCoy and Masuch 2009), "a method of inquiry or study" (e.g., Brown 2006; Luken and Vaughan 2006; Quinlan 2009), and "a framework" (e.g., McNeil 2005; Traverso-Yeppez 2009). In a few instances, IE was referred to as the "work of Dorothy Smith" (e.g., Winfield 2003; Kushner 2006a; Janik-Marusov et al. 2011), including her "feminist sociology" (e.g., Berkowitz and Marsiglio 2007) and "theory of ruling relations" (e.g., Kushner 2006b). It was also described broadly as a "field" (Aldinger et al. 2008), "lens" (e.g., Dyjur, Rankin, and Lane 2011), and "theoretical perspective" (e.g., Townsend 2003).

Direct use of IE was most prevalent in nearly two thirds of the reviewed articles (102 or 57%) where it

was typically employed as the main methodology, or as a framework to examine a body of literature or to reflect on a concept (e.g., Grahame 2003; Adams 2009; King 2009; Baines 2010; Campbell and Kim 2011; Hamilton and Campbell 2011; Krusen 2011; Bisailon 2013; Lowndes et al. 2013). Indirect use of IE occurred in approximately 43 (or 24%) of the articles. Phrases such as "based on" (e.g., McGibbon and Peter 2008), "informed by" (e.g., Scott and Thurston 2004), "draws from" (e.g., Tummons 2010), and "shaped by" (e.g., Butterwick and Dawson 2005) suggest that the authors were using only the principles of IE as "inspiration" and "guidance," or only certain aspects of IE in their research or writing, such as a particular concept, method, or form of analysis (e.g., Cormack and Comber 2013; Gerrard and Farrell 2013). Other authors in a smaller subset of articles (11 or 6%) described using a version of IE such as "multi-sited" (Fisher 2006a), "longitudinal" (Breitkreuz and Williamson 2012), "comparative" (e.g., Sobo, Bowman, and Gifford 2008; Gómez and Kuronen 2011; Muñoz-Laboy et al. 2011), "political activist" (e.g., Bisailon 2012; Hussey 2012; Bisailon and Rankin 2013), or "transnational" (Grace 2003). The remaining articles were primarily non-empirical and either (a) extended authors' own and others' understandings of IE (9 or 5%) through critique (e.g., Walby 2007), explanation (e.g., Deveau 2008; Smith 2008), review (e.g., Kushner 2006a; 2006b), elaboration (e.g., Wittman 2010), or reflection (e.g., Malinsky, DuBois, and Jacquest 2010); or (b) drew from other IE empirical studies (5 or 3%) for the purpose of substantiating an argument or reflecting on and exploring a particular concept (e.g., Rankin 2009; Marshall et al. 2012). The remaining articles (9 or 5%) were not applicable for this type of categorization (e.g., David 2008; Bisailon and Rankin 2013).

### Using IE and Other Approaches

Of the 179 articles in our scoping study, 100 (or 56%) appeared to utilize IE exclusively, while 79 (or 44%) appeared to utilize IE in combination with at least one other theoretical, conceptual, methodological, or analytic approach. Table 3 provides a comprehensive picture of 90 other approaches that were extracted across the 79 sources. Forty-four (or 49%) of the 90 approaches constituted various theories, perspectives, frameworks, ways of knowing, guiding concepts, and models; while 30 (or 33%) were methodologies or research traditions; and 16 (or 18%) encompassed analytic approaches and procedures.

Authors employed anywhere from 1 to 7 additional approaches, with an average of 1.5 other approaches. The use of 1 other approach was most prevalent across the articles, while the use of 7 other approaches was least prevalent across the articles. Most frequently cited theories that were used or explored in combination with IE included a diverse range of feminist perspectives across 6 of the articles, followed by a symbolic interactionist perspective in 6 of the articles. Most frequently cited methodologies that were used or explored in combination with IE included 9 different types of ethnography across 11 of the articles, 4 types of case study across 7 of the articles, and 2 types of grounded theory across 6 of the articles. Most frequently cited analytic approaches that were used or explored with IE included 2 kinds of discourse analysis across 7 of the articles and thematic analysis across 6 of the articles.

Articles were evenly divided in terms of authors who gave some reasoning for merging other theo-

ries, methodologies, or analysis strategies in concert with IE, and authors who did not provide an explanation. Occasionally, more than one rationale for combining various approaches was cited. However, authors employing multiple additional approaches within the same paper or project sometimes only offered a partial justification, describing why one (but not all) of the approaches were utilized. Typical explanations included brief statements suggesting that the combination of approaches enhanced findings by providing the addition of useful “conceptual tools” (Ross 2013), a “more theoretically informed perspective” than is currently available (Butterwick and Dawson 2005), “robust” (Kennedy et al. 2010) or “sensitizing lenses” (Berkowitz and Marsiglio 2007), and particular contexts that IE could not provide on its own, such as historical (Murray et al. 2012) and biographical (Shan 2009). Moreover, the addition of IE (and sometimes other approaches) served as a mechanism for (a) addressing gaps and needs in specific fields (Murray, Low, and Waite 2006; Moser 2009; Bruch 2013), (b) solving problems identified by theorists (Hart and McKinnon 2010), and (c) supporting necessary change (Restoule et al. 2013) through the concretization of strategies, analyses, evaluations, or conclusions with increased specificity, practicality, and utility for actual people (Murray et al. 2006; Moser 2009; Hart and McKinnon 2010; Restoule et al. 2013), and the development of “holistic understanding[s]” surrounding a given process (Murray et al. 2006).

Conversely, other approaches were added to address areas authors claimed that IE alone could not meet, such as making the research accessible by using arts-based methods (Slade 2012), understanding

Table 3. Other Approaches Used or Explored with Institutional Ethnography (IE).

THEORIES, PERSPECTIVES, FRAMEWORKS, WAYS OF KNOWING, GUIDING CONCEPTS, AND MODELS	METHODOLOGIES OR RESEARCH TRADITIONS
Actor network theory	Anishinaabe (Ojibwe) methodology
Adapted partnership framework (Scott-Taplin)	Arts-informed research using reader's theatre
Autobiographical occasions (Zussman)	“Biomedical technology”
Bourdieu's theories and concepts	Bourdieuian field analysis
Forms of capital	Case study (3)
Theory of practice	Extended case method (2)
Conceptual frame of policy sociology (Ball)	Collective case study
Critical perspective	Comparative case study
Critical realist perspective	Critical qualitative methodologies*
Critical success factors	with attention to reflexivity and power
Culture of work enforcement (Piven)	Ethnobotany
Decision analysis/Risk-analysis models	Ethnographies
Decolonial knowledge	Activist ethnography
Disability	Autoethnography
Domains of scholarship (Boyer)	Critical ethnography
Dualism paradox (Durkheim)	Cross-cultural ethnography
Embodied care (Merleau-Ponty, Bourdieu, Goffman)	Hospital ethnography
Feminist perspective(s)	Medical anthropological ethnography
Feminist critical theoretical framework	Political activist ethnography* (3)
Feminist materialist intersectionality	Psycho-social ethnography of the common-place method*
Feminist standpoint theory	Transnational institutional ethnography*
Intersectionality theory	Ethnomethodology
New and feminist materialisms	Conversation analysis
On social and gender inequalities	Grounded theory (6)
Foucault's theories and concepts	Modified grounded theory
Panopticon metaphor	Life history methods
Power and governmentality (2)	Mixed methods (3)
Institutional phase theory	Naturalist approach to sociology
Interorganizational relations theory	Participatory action research (2)
Interrogations of an audit culture (Ball and Morley)	Feminist participatory research methodology
Model for the evaluation of rural sustainability	Safety audit methodology
New literacy studies theoretical perspectives	
Outsider/within status (Hill-Collins)	
Performance and visual culture	
Politics and the public sphere (Ardent)	
Pragmatism	
Symbolic interactionism (6)	
Procreative identity framework	
Relational psychoanalysis theory	
Rhetorical spaces (Code)	
Sociology of science theoretical perspectives	
Structuralism	
Structuration theory from cultural studies	
Texts (Titchkosky)	
Transgender theories	

## ANALYTIC APPROACHES AND PROCEDURES

Constant comparative strategies of concept development  
 Content analysis  
 Critical social science analytic frame  
 Crystallization (Janesick)  
 Discourse analysis (3)  
     Critical discourse analysis (4)  
 Historical analysis  
 Listening guide method of analysis  
 Narrative analysis (2)  
 Open and axial coding  
 Phenomenological analysis  
     Interpretive phenomenological analysis  
 Secondary analysis of survey data  
 Social network analysis including mappings  
 Standard anthropological text analysis techniques  
 Thematic analysis (6)

*Notes.* Approaches within each column are presented in alphabetical order. Repeatedly cited approaches are followed by parentheses and a numerical value indicative of the total number of articles across which they were employed. Specific subsets of broader approaches (such as various types of feminist perspectives, case study methodologies, ethnographies, and so on) are marked by the use of indentations.

\*Approaches marked with an asterisk were regarded by authors as related to IE.

Source: *Self-elaboration.*

how texts arrived at their locations through Actor Network Theory (Tummons 2010), or enhancing the study of sensitive issues with increased attention to people's emotions and researcher's positioning via a proposed approach called biomedical technography (McGibbon and Peter 2008). Finally, Taber (2010) makes a case for employing autoethnography in her IE study because she could not obtain organizational access to conduct interviews.

Individuals also acknowledged various sources of theoretical (e.g., Nichols 2009), ontological (Satka and Skehill 2011), identity (Bain 2010), representational (Restoule et al. 2013), and design (Moser 2009) inspiration (or influence) that informed their projects, scholarship, or researcher positioning. Specific authors located themselves as being "in the middle of [certain] disciplines," striving to achieve "a balance between [multiple] positions" with the goal of ensuring that findings are of mutual relevance to different groups (Klaver and Baart 2011:691).

Importantly, IE was viewed as an ideal companion to other approaches because together, they "support and complement one another" (Daniel 2005) with respect to their "philosophic assumptions" (Kushner 2005); "interpretive nature" (Murray et al. 2012); "standpoints" (Dergousoff 2008); "emphases," "concerns," or "conceptualizations" (Gerrard and Farrell 2013; Restoule et al. 2013); orienting concepts or foci (Moser 2009; Høgsbro 2010); and similar groundings in the study of oppression, marginalization, power, and/or knowledge (Murray et al. 2006; Salazar 2008). Notably, multiple "other" approaches (marked with an asterisk in Table 3) were regarded by authors as either "heavily based on;" "emerging from;" or a "specialized form," "extension," or "expansion" of IE. These interconnected branches comprise political activist ethnography (Bisaillon 2012; 2013; Hussey 2012), psychosocial ethnography of the commonplace method (Gibson, O'Donnell, and Rideout 2007), and transnational institutional ethnography (Grace 2003). One of the experts we consulted pro-

vided important historical information regarding the origins of political activist ethnography, stating:

This approach is based on a paper by George Smith called "Political Activist as Ethnographer" which was written and published before the name "institutional ethnography" was invented; yet it can be viewed as an early formulation of IE as an activist approach. [Expert Consultation, October 5, 2015]

IE was also located under the umbrella of critical qualitative methodologies (Bruch 2013).

A few authors provided in-depth rationales for using IE in combination with other tools, particularly when they employed it in concert with the ideas of major theorists such as Michel Foucault, Pierre Bourdieu, and Hannah Arendt (Mykhalovskiy, McCoy, and Bresalier 2004; Nichols 2009; Gerrard and Farrell 2013). Such authors typically pinpointed the opportunities resulting from marrying the approaches, and acknowledged direct implications for their findings. For instance, Mykhalovskiy, McCoy, and Bresalier (2004) articulate:

While Smith's project and Foucauldian work each has its own intellectual specificity, we draw them together as resources that help us to think about power as multiply sited and exercised through relations of knowledge. From this location, our analysis of interviews with people living with HIV, community-based HIV health information and the current biomedical research literature suggests that in the context of HIV much more is at work in people's relationships to treatments and medical advice than the power of medicine over patients. [p. 317]

Likewise, authors juxtaposed approaches for comparative purposes, often outlining the varied contributions to a given field (David 2008); or they troubled (a) taken-for-granted notions such as "Foucault's Panopticon metaphor" (Walby 2005), or (b) researcher identities (Bain 2010) in ways that unearthed complexities and contradictions.

In some cases, authors conveyed Dorothy Smith's criticisms of particular theorists' assumptions (Gerrard and Farrell 2013), and acknowledged the challenges inherent in mixing methodologies that were not aligned with IE's epistemology and ontology (Nichols 2009; Quinlan and Quinlan 2010) and that, in fact, Dorothy Smith viewed IE as a framework for inquiry as opposed to a research methodology (Tummons 2010). However, according to these and other authors, the strength of the commonalities shared between IE and other approaches were enough to balance the disparities in ways that led (or might lead) to innovative, expansive, and clarified methods for examining social phenomena (Mykhalovskiy et al. 2004; Eveline, Bacchi, and Binns 2009; Nichols 2009; Quinlan and Quinlan 2010; Gerrard and Farrell 2013). Ultimately, when attentive to multiple approaches' strengths, shortcomings, and subsequent reworkings (e.g., Husso and Hirvonen 2012) and committed to building "bridges" or "locating intersections" (e.g., Restoule et al. 2013), authors saw themselves as "working with and between" the approaches, conceptualizing each as being "in dialogue with" the other (e.g., Dergousoff 2008; Gerrard and Farrell 2013).

When explicit explanations for using multiple approaches were not obvious, implicit rationales

could sometimes be surmised from the contextual, content, or procedural clues embedded within the articles. Authors appeared to have chosen a combination of approaches (including IE) to (a) offer a different or extended perspective; (b) advance a case or develop a critique; (c) demonstrate innovation by making new contributions; (d) achieve pragmatic needs or personal desires; (e) support reflection, reflexivity, or participation; (f) provide a way to organize, structure, present, or frame the analysis; (g) draw upon preferred or most familiar research methods; (h) conform with disciplinary or scholarly knowledge, training, or conventions; or (i) adapt to the in-situ challenges encountered over the course of the inquiry.

### Data Collection Methods

The majority of manuscripts (132 or 74%) used multiple data collection methods such as interviews, texts, and observations. Twenty-one articles (or 12%) used only one source of data, and the most frequent single data collection method was interviews. The remaining 24 articles (or 13%) did not collect data. Additional methods of data collection captured in the “other” category included shadowing, drawing on archival data, gathering community demographics, employing a “think out loud” technique, and incorporating participant journaling. Figure 3 denotes the frequency of the data collection methods used across publications.

Authors of 21 publications appeared to draw on material obtained predominantly through a single method of data collection. More than half of these publications (12 or 57%) relied primarily on inter-

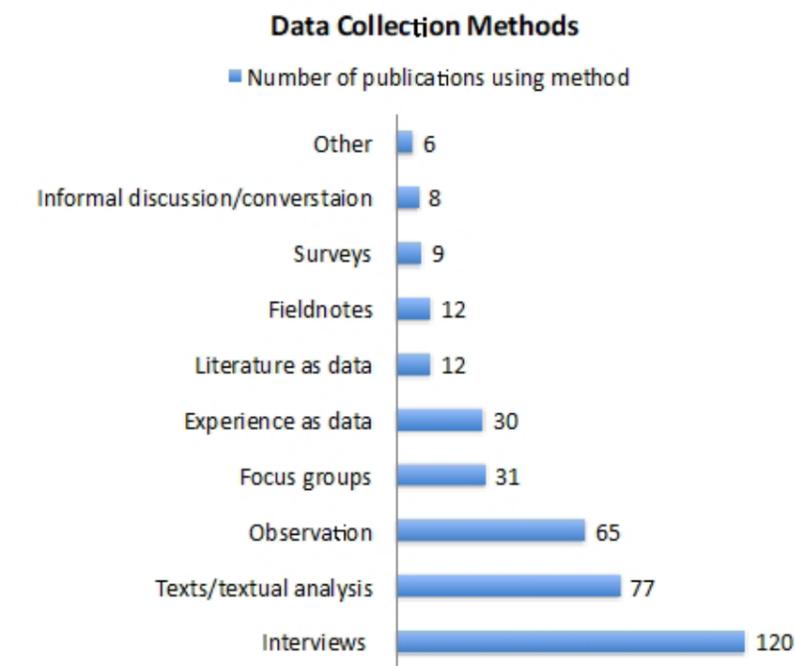
view data (Harrison 2006; MacKinnon 2006; Murray et al. 2006; Weigt 2006; Berkowitz and Marsiglio 2007; Breikreuz, Williamson, and Raine 2010; Reimer and Ste-Marie 2010; Husso and Hirvonen 2012; Nilsson et al. 2012; Beck et al. 2013; Haneda and Nespors 2013; Taylor 2013), which is consistent with some claims that interviewing is one of the most commonly used data collection methods in institutional ethnography (DeVault and McCoy 2006). Importantly, some of these authors did situate key issues within an historical context meant to serve as a complement and comparative reference point to their interview data (e.g., Murray et al. 2006). Authors of 3 publications (respectively) drew largely on literature (Folkmann and Rankin 2010; Dyjur et al. 2011; Dale et al. 2013) or texts (Bell and Campbell 2003; de Montigny 2003; Harrison 2012) as their primary data sources, while authors of 2 publications (Butterwick and Dawson 2005; de Montigny 2011) relied on their own experiences as data. Finally, authors of 1 publication (Stooke and McKenzie 2009) used participant observation as their key method of data collection, although informal discussions also occurred during some of their observations.

At first glance, authors’ extensive reliance on a single data source in 23 or 13% of the publications may seem curious considering that multiple and diverse methods of data collection tend to be the norm in IE (Campbell and Gregor 2002). However, a handful of articles were identified as either critical literature reviews or experiential pieces (Butterwick and Dawson 2005; Folkmann and Rankin 2010; Dyjur et al. 2011; Dale et al. 2013), where drawing largely on a single data source seems appropriate. In the case of empirical investigations, the need to

adhere to specific word count restrictions requires that authors select only a portion of a larger project to explore, a potentially challenging task for institutional ethnographers, because of the scope and complexity of their work, and of the institutional

relations being explicated. Some authors strategically focused on providing a detailed analysis of a key text, textually-mediated process, or relevant discourse (e.g., Bell and Campbell 2003; de Montigny 2003; Harrison 2012).

Figure 3. Data Collection Methods.



Source: Self-elaboration.

### Standpoint

In reporting the standpoint of the research, our quest was to preserve and present the messiness and the multi layers of people’s lives through the varying locations that authors took up in their work. This notion of standpoint humanizes the starting point of the research and speaks to how IE typically begins from the margins or from the experiences of people located outside the ruling apparatus (Bisaillon 2012); individuals bereft of the authority to make policy or

funding decisions, often occupying multiple levels of disadvantage and vulnerability in society. However, accurately categorizing the diverse and varied standpoints across publications proved awkward and unmanageable. Instead, we opted to present the range of standpoints as a word cloud (see: Figure 4 for details). This method provides a general overview and an idea of the most commonly reported standpoints as indicated by the size of font. In our word cloud, “nurses,” followed by “occupational therapists,” and “people with HIV” were the most prominent,

suggesting that they were the most frequently cited standpoints. When possible, we maintained the authors' original wording.

Figure 4. Overview of Standpoints.



Source: Self-elaboration.

### Institutional Relations

Next, we examined the primary institutional relations that were addressed within each publication (see: Table 4 for details). We developed a series of operational definitions based on the results

of a qualitative content analysis of reported data. Category clusters were then created to describe the primary institutional relations discussed in each paper, and we subsequently quantified these clusters by counting the number of times each relation occurred across the range of publications. A total of 23 publications were excluded because authors did not examine particular institutional relations, or the papers were deemed to be conceptual (e.g., articles coded as “educative” or “toolkit”).

Fifty articles (or 28%) addressed institutional relations related to health-care systems, service delivery, diagnosis, treatment, or prevention. The next most prevalent

institutional relations addressed were educational (in 30 or 17% of articles), social services (in 26 or 14% of articles), and governmental (in 22 or 12% of articles). Interestingly, 16 articles (or 9%) were classified as exploring “other” institutional relations related to religion, gender mainstreaming,

anti-oppressive practices, North American cowboy culture, the discourse of black mothers, research, international development, and housing or home ownership. The remaining relations included community organizing, immigration, humanitarian work, and agriculture.

Table 4. Operational Definitions of Institutional Relations.

INSTITUTIONAL RELATION (OPERATIONAL DEFINITION)	#(% OF PUBLICATIONS)
<i>Healthcare</i> —Any relations regarding healthcare systems, healthcare service delivery; or relations related to diagnosis, treatment, or prevention of disease, illness, injury, and other physical and mental impairments	50 (28%)
<i>Education</i> —Any relations addressing formal learning in which knowledge, skills, and/or habits are transferred (including daycare, schooling/schools, university, continuing education, fieldwork placements, on-the-job learning, etc.)	31 (17%)
<i>Social Services</i> —Social work, homeless shelters, battered women’s services, disability support, etc.	26 (14%)
<i>Government</i> —Any relations connected to systems by which a State or community is governed (including legal, court, or prison systems; military; and municipal, provincial, or federal governance)	22 (12%)
<i>Community Organizing</i> —A process where people who live or work in proximity to each other come together into an organization that acts in their shared self-interest	4 (3%)
<i>Immigration</i> —Any relations addressing the immigration, settlement, or arrival of people	3 (2%)
<i>Humanitarian work</i> —Aid and action designed to save lives, alleviate suffering, and maintain and protect human dignity during and in the aftermath of emergencies	3 (2%)
<i>Agriculture</i> —Farming, food production, and the cultivation of animals, plants, and other life forms for food, fiber, biofuel, and other products used to sustain and enhance human life	2 (1%)
<i>Other</i> (including religious institutions, gender mainstreaming, anti-oppressive practices, North American cowboy culture, the discourse of black mothers, research relations, international development, housing and home ownership)	16 (9%)
<i>N/A</i> —Did not investigate institutional relations (e.g., educative resource or conceptual paper)	22 (12%)

Source: Self-elaboration.

Because we chose to identify the most prominent or focal set of institutional relations central to the research or writing, which required distilling information into a single category or term, the richness and complexity of these relations is oversimplified.

## Discussion

Our findings reveal the expansive scope of IE across disciplines, sectors, and countries including the breadth of ways it is being conceptualized and applied in practice. IE is diversely conceptualized as: a (sociological) method of inquiry, methodology, research approach, feminist sociology, theory and methodology, framework, lens, field, perspective, and form of analysis. Inevitably, authors applied IE differently across their research and writing, ranging from direct usage or close adherence to IE in a comprehensive manner; to indirect usage or loose adherence to IE by drawing on it as inspiration, guidance, or influence; or borrowing from a certain facet of IE such as a particular theory, concept, method, tool, or analytic strategy. Additionally, some authors adapted IE to suit a specific purpose, which entailed using modified versions of IE to fit a given context or objective; while others strived to extend existing understandings of IE through critique, explanation, review, elaboration, or reflection.

Importantly, when used as a method of inquiry, IE supported authors to: explicate the social organization of knowledge; depict textually-mediated relations; highlight contradictions between authoritative knowledge and practical knowledge and experience; make the often invisible work of particular people visible to others; show how ruling relations,

discourses, and forms of institutional power organize and regulate people's lives; map out particular work processes; demonstrate how people's work in certain spheres of contemporary society is changing or being reorganized; question taken-for-granted assumptions, practices, or knowledge; and provide an alternative analysis that shows or tells something new or different from previous work.

A key finding from our review is the significant extent to which IE is being used in combination with other theories, methodologies, or analytic tools. This issue reflects what appears to be a growing debate within the IE community—whether IE is amenable to being used in concert with other approaches. In fact, one of our expert consultants indicated that our Table 3 “opens up a can of worms” (Expert Consultation, October 5, 2015). At the core of this debate is IE's unique ontological position that continues to generate points of tension and ambiguity (Smith 2006; Walby 2007; 2013). Practitioners of IE are required to make the “ontological shift,” which refers to a move from the “generalized world of conceptual and theoretical explanations” (Smith 2006:51) to the material world of people's everyday activities (Smith 2005). This distinction in IE is evident in every facet of its methodology, beginning with its rejection of theoretical supremacy, and the particular ways that methods are executed and data are analyzed. With such strong claims to a particular way of seeing the social world, and the directives around how its methods and analyses are carried out, the question of how other theories, methodologies, and methods can work in tandem with IE is tantamount to asking whether we can mix ontologies/epistemologies, which some researchers liken to a kind

of “ontological gerrymandering” (Giacomini 2010). Yet, as Guba and Lincoln (2005:206) note, the paradigmatic controversies are mostly occurring at the borders, “the places that show the most promise for projecting where qualitative methods will be in the near and far future.”

The tensions inherent in mixing ontological and epistemological differences are familiar in the burgeoning mixed methods/mixed research<sup>1</sup> debates (Onwuegbuzie, Johnson, and Collins 2009; Hess-Biber and Johnson 2013; Morse and Cheek 2014; Howes 2015), which can inform how we think about “mixing” IE with other approaches and methodologies. At the core of the mixed research debate is whether methods, purposes, kinds of data, and levels of analysis from differing philosophical perspectives or paradigmatic stances can communicate with each other and be mixed or co-exist (Hess-Biber and Johnson 2013; Howes 2015). In response to this issue, proponents of mixed research have increasingly situated their projects within the construct of metaparadigms such as pragmatism and dialectical pluralism (Howes 2015). Similarly, Quinlan and Quinlan (2010) locate their pairing of IE and Social Network Analysis (SNA) within the pragmatist paradigm, using Habermas' theory of communicative action. While some of the authors in our review positioned their blending of IE with other methodologies/methods as a “mixed methods” design, few provided details or explications about the basis for their decisions, including, most importantly, the

<sup>1</sup> The term “mixed research,” as opposed to “mixed methods research,” indicates that mixing can occur at levels outside the quantitative and qualitative dyad to include philosophical stances, data collection, and analysis (Howes 2015).

philosophical underpinnings. This lack of methodological and philosophical clarity is at the forefront of the critique that mixed methods research has not, in the past, been sufficiently justified (Howes 2015), and continues to pose a significant barrier to rationalizing the mixing of IE with other approaches/methods, as our review demonstrates. Explicating the reasons behind choosing to use IE as a “mixed design” can contribute to the development of institutional ethnographic research in innovative and promising ways.

The potential to cultivate relevant and effective methodological practices and designs that can answer research questions more completely is recognized in mixed research as occurring precisely in those spaces created by the “turbulence” of crisscrossing paradigms (Guba and Lincoln 2005; Hess-Biber and Johnson 2013; Howes 2015). Similarly, in our study, the intent to address complex political, educational, health, and other social research questions that could not be answered with IE alone was explicitly and implicitly the over-riding rationale authors gave in this category. They spoke of needing to “push methodological boundaries” (Taber 2010:6) and “contribute to the development of an innovative methodological approach” (Satka and Skehill 2011:192). Although the rationales provided were mostly convincing to us, we questioned what the implications might be if we are to take Dorothy Smith's (2005) stance that IE is not a methodology, but rather a “sociology.” This is an important question to consider as Dorothy Smith's *raison d'être* for developing IE stems from her intent to provide an “alternate sociology” moving from an approach where people are typically considered as the objects

of inquiry to an approach where aspects of the institutions relevant to people's experiences are the focus of inquiry (Smith 2005). Dorothy Smith (2005:2) cautions that although she has described IE as a "method of inquiry," it is in fact "a bit misleading" because "it is not just a methodology." Based on our review, it is evident that in its combination with other methodologies/approaches, IE is frequently being taken up as a methodology and as a method. The extent to which it is used as a methodology/method is particularly apparent in how authors described their rationale for combining IE with the work of other major theorists such as Foucault, Arendt, and Bourdieu (Mykhalovskiy et al. 2004; Nichols 2009; Gerrard and Farrell 2013). Authors highlight the "methodological" and "pragmatic tools" that IE offers, implying in some cases, that with its materialist grounding, IE can deliver the empirical instructions where other theorists and ideas cannot. The tension accompanying this rationale is evident throughout Nichols' (2009:63) paper, which she positions as "the outcome of my work to reconcile a loyalty to theory with a desire to use IE as an activist (and materialist) qualitative research strategy." Nichols (2009:72) reports on how she draws from Hannah Arendt's political theory, "easily anathema to IE" to provide the conceptual basis of the project, while moving forward with Dorothy Smith's standpoint concept that offers the "concrete place from which to investigate the social world" (Nichols 2009:64). In other projects where IE intersects with a Bourdieuan framework, IE is positioned as bringing "methodological clarity" (Gerrard and Farrell 2013); whereas within a Foucauldian perspective, the methodological approach "is shaped by Dorothy Smith's notion of institutional ethnography" (Butterwick and Daw-

son 2005) and contributes an "empirical sociology of 'ruling relations'" (Mykhalovskiy et al. 2004).

The question remains, if IE is being taken up as methodology, is the research project truly an "institutional ethnography" as outlined by its founder, Dorothy Smith, and does it matter? It matters in IE's call to work with other institutional ethnographers who in sharing the same ontology can bring together their separate studies of different institutional complexes. By illuminating the meta-discourses that cross organizations, institutions, and societies, deeper and far-reaching changes may be effected (DeVault 2006). Despite the potential merit of such a synthesis of institutional ethnographies, we did not come across any examples of this kind of work in our review. If we consider the impetus behind Dorothy Smith's creation of a "sociology for the people"—to help individuals understand how they are oppressed—the resolve as to whether IE can be taken up as a methodology leans in the affirmative direction. Institutional ethnography is a highly technical and complex practice demanding a kind of scholarly attention that requires sufficient research time to implement and translate in ways that are useful to changing people's lives. This challenge, identified as a constant and real struggle for institutional ethnographers (Campbell and Gregor 2002), is being addressed by the myriad ways that authors applied a specific aspect of IE to uncover the actualities of people's work, and relied on "practical" and "recognized" sources to help them analyze institutional ethnographic data (Expert Consultation, July 25, 2014), with varying needs, goals, contexts, resources, and expectations in mind. This actuality suggests IE's usefulness as a methodology across

disciplines, at least for the scholars and researchers who continue to take it up in innovative ways.

### Limitations and Recommendations

The challenges of conducting an IE scoping review are reflected in the limitations and subsequent recommendations we have outlined below. Given that IE is currently not a formal subject heading or an indexed term across databases, we were restricted to conducting a textword-specific search, which presented many difficulties. For example, using the textwords "institutional ethnograph\*" captured a number of irrelevant sources, including ones that (a) used "institutional" and "ethnography" in the same sentence, but not in reference to IE as a method of inquiry, (b) contained "institutional ethnography" in the title of one of their references, (c) cited an IE study, but did not actually employ Dorothy Smith's IE as part of their own approach, or (d) used the phrase "institutional ethnography" in reference to conducting an ethnography of or within an institution, which is not synonymous with employing IE as a method of inquiry. Consideration should be given to making IE a formal subject heading or indexed term across databases in order to support the further tracking, cataloguing, and study of this important body of work.

Categorizing and coding content from IE papers proved difficult, as the purpose and intent of IE is to resist categorization and classification. Our attempts to distil complex content into simple categories resulted in a loss of the richness and complexity that IE emphasizes. Additionally, restricting the scope of this study brought about several limitations. First,

the timeframe of the data search did not capture all relevant works, such as the many formative studies seminal to the development of IE prior to 2003. Second, our decision to focus this scoping review strictly on peer-reviewed journal articles limited the breadth of information that could be gathered. During the investigation, we noted numerous book chapters, dissertations, conference abstracts, and front/back matter that directly addressed the utilization and application of institutional ethnography. Our review presents a very specific and detailed overview of trends and developments from the peer-reviewed journal article publications only, and omits summarizing the rich content from various types of IE works published elsewhere. Third, because of time constraints, we opted not to re-run the search after charting the sources, a practice that occurs in a small percentage of scoping reviews (Pham et al. 2014). As such, one of the significant limitations of this project is that the most recent manuscripts published after October 28, 2013 were omitted from our review. Fourth, a number of articles were excluded from this study because they were not available in English. Other languages in which these works were published included (but were not limited to): French, German, Italian, Portuguese, and Spanish. Collaborative international projects aimed at translating IE research across multiple languages are urgently required in order to build a shared understanding of how IE is being taken up around the globe.

Although some authors appeared to draw on an IE-informed analysis and cite works by Dorothy Smith, they did not explicitly use the terminology "institutional ethnography" to label or position

their work, and consequently these sources were excluded from our study. In an effort to maintain a transparent research process and clear inclusion criteria, we refrained from reading between the lines to determine whether authors utilized institutional ethnography. Thus, the number of peer-reviewed IE journal publications may be higher than what we have captured. To ensure that IE work is included in future reviews which can advance the field, it is important that authors label their research and writing as institutional ethnography.

Additional omitted sources (a) described their work as conceptually, theoretically, methodologically, or analytically rooted in IE; and (b) referenced other institutional ethnographers; but did not (c) cite Dorothy Smith's work directly. One of our Expert Consultants suggested that "as a field matures the method rather than its founder is identified" (October 5, 2015). Learning about the origins and history of IE as developed by Dorothy Smith is essential to understanding IE's key tenets, ontology, orienting concepts, and associated commitments and politics. Whether taken up on its own or with other approaches and methodologies, IE is best and appropriately utilized when it is sufficiently understood. Citing Smith in a project that entails using IE, indicates a continued acknowledgement and commitment to the core principles of IE.

While Step 6 of Arksey and O'Malley's (2005) framework (involving the optional consultation with stakeholders in the field) was extremely beneficial, we felt that it came rather late in the course of our research process. Some of the consultants' requests were addressable, such as the provision of

further clarifications, contextual details, and rationales; elaborations associated with IE terminology, our process, and the tensions we encountered; and an articulation of the main "take away" messages. However, other important comments and queries (such as attending to points of particular interest to seasoned institutional ethnographers, relevant historical details, and key concerns in the field) were difficult to tackle, since our data collection had already occurred. We suggest the inclusion of an additional optional stakeholder consultation prior to Arksey and O'Malley's (2005) fourth step of charting the data so that researchers can receive preliminary feedback in regards to: their research question, inclusion and exclusion criteria, operational definitions, and proposed chart headings. Such a consultation would enable teams to ensure they collect the appropriate data required to address key issues, and to make necessary adjustments to strengthen their research process and the utility of their findings.

Although it is beyond the scope of this review specifically, and of scoping reviews more generally, which traditionally refrain from judging the quality, appropriateness, or rigor of the research and writing of selected articles (Arksey and O'Malley 2005; Levac et al. 2010), there were instances when we engaged in informal debate with each other regarding the (in)compatibility of particular approaches that had been paired. The limited information, lack of explanation, and ambiguous rationales for combining IE with other methodologies/methods is a weakness we identified in numerous articles. We urge authors to clearly explicate how and to what degree they are drawing on IE and other theoretical, conceptual, methodological, or analytical tools in their

research and writing (e.g., as primary approaches, secondary approaches, equivalent approaches, etc.). Rationales for, and the processes of, utilizing multiple approaches should be provided upfront with attention to opportunities and tensions. In addition to making an argument (or claim) for why the merging of specific tools is acceptable and worthwhile, offering an open discussion of the difficulties, dilemmas, and divergences encountered would prove helpful. We also suggest that experienced institutional ethnographers work together to create a concise but comprehensive resource that addresses (a) necessary features of institutional ethnographies, (b) common errors made in IE research and writing, and (c) the appropriateness of employing a range of tools in conjunction with IE.

### Future Research

Considering the limits of what our project can answer, we propose numerous avenues for further investigation. For example, examining IE as a method of inquiry across the comprehensive body of grey literature (conference presentations, reports, magazines, newsletters, dissertations, etc.) and published literature (books, edited book chapters, handbooks, encyclopedia entries, etc.) will contribute to a deeper and expanded understanding of how IE is taken up as a method of inquiry. Future scoping studies should also document (a) the IE-specific analysis steps that were employed; (b) whether or not the project was funded (and if so, the funding source); (c) authors' professional positions (graduate student, professor, community activist, etc.) and disciplinary affiliations; and (d) type of IE (e.g., predominantly textual, discursive/ideological, change-oriented,

historical, and so on). Such documentation will provide important information about the IE analysis process, the funding bodies or sources that support IE research, the people who employ IE, and the range of IE works that exist.

Moreover, we recommend that prospective reviews trace the historical evolution of IE. Mapping Dorothy Smith's connection to authors by decade, based on (a) a direct relationship (such as colleague, advisor, committee member, external examiner, instructor, etc.); (b) an indirect relationship (for instance, one of Dorothy Smith's former advisees is now an advisor or committee member to the author); or (c) no known relationship, might enable the identification of authors as first-, second-, third-, fourth-, fifth-, or new-generation IE users. Data could be examined for patterns based on how different generations of Institutional Ethnographers have referred to, utilized, and taken up IE over time. Such a study might offer a novel picture of the IE community, the proliferation of IE, and the future of IE. Indeed, questions remain as to whether certain orienting concepts and tenets have become muddled or misused over the years, and whether there is an immediate need to clarify and preserve the shared language that cuts across disciplinary divides, so that it remains intact and well-understood long after Dorothy Smith and first-generation institutional ethnographers have stopped teaching, researching, and mentoring new scholars in the field.

Examining ruling relations based on public and private sector groupings in order to uncover noteworthy distinctions, interrelationships, and changes (as was suggested by one of our Expert Consultants)

fell beyond the scope of this project; however, it is another important area for future inquiry. Finally, exploring the uptake of IE in particular areas identified in our review, such as healthcare and education, could reveal important key trends and patterns of ruling relations.

## Conclusion

The strength of IE as it is variously taken up as a method of inquiry is evident in the range of scholars, researchers, professionals, and activists engaging with IE across a myriad of disciplines, countries, and sectors. The question of whether it is appropriate to use IE with other theories, methodologies, methods, and analytic tools continues to be of growing interest and warrants ongoing discussion. Regardless of the answer, it is clear from our review that authors are applying IE to their research and writing projects

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in both conventional and unexpected ways. We urge the IE community, in all its forms, to fully know and explicate IE, however they choose to take it up.

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