

The Canadian Journal for the Study of Adult Education La revue canadienne pour l'étude de l'éducation des adultes



Institutional Ethnography A Marxist-Feminist Approach for the Study of Praxis Ethnographie institutionnelle Une approche marxiste-féministe à l'étude de la praxis

Sara Carpenter and Shahrzad Mojab

Volume 36, Number 1, June 2024

For the People: Dorothy Smith and Adult Education
Pour le peuple : Dorothy Smith et l'éducation des adultes

URI: <https://id.erudit.org/iderudit/1115562ar>

[See table of contents](#)

Publisher(s)

Canadian Association for the Study of Adult Education / L'Association canadienne pour l'étude de l'éducation des adultes

ISSN

0835-4944 (print)
1925-993X (digital)

[Explore this journal](#)

Cite this article

Carpenter, S. & Mojab, S. (2024). Institutional Ethnography: A Marxist-Feminist Approach for the Study of Praxis. *The Canadian Journal for the Study of Adult Education / La revue canadienne pour l'étude de l'éducation des adultes*, 36(1), 23–38.

Article abstract

Institutional ethnography (IE) is often seen as a useful tool in the study of organizations and bureaucracy. However, many adaptations of the approach ignore the explicitly historical materialist project embodied in Smith's conceptualization of "ontological shift" and her assertion that institutional ethnography is a "reinterpretation" of Marx's epistemology. These adaptations dematerialize and de-historicize IE as a method of inquiry, thus obscuring Smith's unique approach to "Marxist feminism" and her particular contributions to the study of capitalist social relations. A similar problem exists in adult education scholarship around questions of consciousness, ideology, and praxis; ideology is reduced to thought content, and consciousness is returned to an idealist position, fragmenting from its dialectical relation to being, or praxis. In this paper, we revisit key formulations with Smith's sociology to extend their application to the study of praxis in critical adult education.

Volume 36 Issue 1

cjsae

the canadian journal for the study of adult education

la revue canadienne pour l'étude de l'éducation des adultes

rcééa

INSTITUTIONAL ETHNOGRAPHY: A
MARXIST-FEMINIST APPROACH FOR THE STUDY
OF PRAXIS

Sara Carpenter and Shahrzad Mojab

*The Canadian Journal for the Study of Adult Education/
La revue canadienne pour l'étude de l'éducation des adultes*
Editors-in-Chief: J. Adam Perry and Robin Neustaeter
French Language Editor: Jean-Pierre Mercier
Special Edition Editor: Sara Carpenter
www.cjsae-rceea.ca

36,1 June/juin 2024, 23–38
ISSN1925-993X (online)

© Canadian Association for the Study of Adult Education/
L'Association canadienne pour l'étude de l'éducation des adultes
www.casae-aceea.ca

INSTITUTIONAL ETHNOGRAPHY: A MARXIST-FEMINIST APPROACH FOR THE STUDY OF PRAXIS¹

Sara Carpenter

Faculty of Education, University of Alberta

Shahrzad Mojab

Department of Leadership, Higher, & Adult Education, OISE/University of Toronto

Abstract

Institutional ethnography (IE) is often seen as a useful tool in the study of organizations and bureaucracy. However, many adaptations of the approach ignore the explicitly historical materialist project embodied in Smith's conceptualization of "ontological shift" and her assertion that institutional ethnography is a "reinterpretation" of Marx's epistemology. These adaptations dematerialize and de-historicize IE as a method of inquiry, thus obscuring Smith's unique approach to "Marxist feminism" and her particular contributions to the study of capitalist social relations. A similar problem exists in adult education scholarship around questions of consciousness, ideology, and praxis; ideology is reduced to thought content, and consciousness is returned to an idealist position, fragmenting from its dialectical relation to being, or praxis. In this paper, we revisit key formulations with Smith's sociology to extend their application to the study of praxis in critical adult education.

Résumé

L'ethnographie institutionnelle (EI) est souvent perçue comme outil pratique pour étudier les organisations et la bureaucratie. Cependant, plusieurs adaptations de l'approche ignorent le projet historiquement explicitement matérialiste qui traverse la conceptualisation du « virage ontologique » de Smith et son affirmation que l'ethnographie institutionnelle constitue une « réinterprétation » de l'épistémologie de Marx. Ces adaptations suppriment la matérialité et l'historicité de l'EI comme méthode d'enquête, éclipant donc l'approche unique de Smith au « féminisme marxiste » et ses contributions particulières à l'étude des relations sociales capitalistes. Un problème similaire existe dans le domaine de l'éducation des adultes concernant les questions de conscience, d'idéologie et de praxis; l'idéologie est réduite au contenu des idées et la conscience est ramenée à un positionnement idéaliste, fragmentant alors la relation dialectique à l'existence, ou la praxis. Dans cet article, nous réexaminons

1 This paper is an updated reprint of a chapter from Carpenter & Mojab (2017).

les formulations essentielles de la sociologie de Smith afin d'élargir leur application à l'étude de la praxis en éducation des adultes critique.

Keywords

Marxist feminism, institutional ethnography, praxis, consciousness, learning, critical adult education

Mots-clés

féminisme marxiste, ethnographie institutionnelle, praxis, conscience, apprentissage, éducation des adultes critique

In this article, we offer some theoretical explications for adapting the feminist sociological tool of institutional ethnography to the field of education. We emphasize that we are advocating for an explicitly Marxist-feminist reading of institutional ethnography, in contradistinction to other readings of the method that de-emphasize or confuse its materialist-feminist ontology. For us, Marxist feminism offers analytical tools grounded in dialectical historical materialism with the ability to illuminate inter-constitutive gendered and racialized social, material relations of capitalism. Furthermore, Marxist-feminist analysis calls us to a collective struggle to transform these relations and, thus, pursue forms of research that will help to build the knowledge necessary for revolutionary struggle. We see institutional ethnography as an approach that can re-emphasize dialectical historical materialism within critical education, advance feminist and anti-racist analysis within our field, and actualize research into consciousness and learning for purposes of revolutionary struggle.

Institutional ethnography, as developed by feminist sociologist Dorothy E. Smith, aims to reorganize "the social relations of knowledge of the social" (Smith, 2005, p. 29), meaning the goals of institutional ethnography are not simply to produce knowledge on a given subject, but also to reorient our ways of thinking about social reality and how it can be known. While Smith's work has significant international influence in women's studies, sociology, social work/services, and the medical sciences, Smith's brand of Marxist feminism has been used far less by critical educational theorists, with several notable exceptions in the field of adult education (Carpenter, 2021; Choudry, 2015; Darville, 2014; Grahame, 1998; Gruner, 2012; Hampton, 2020; Jackson, 1995; Ng 1988, 1995; Ng & Shan, 2010; Shan, 2009; Wilmot, 2011). Our assertion here is that institutional ethnography, as an approach to social inquiry that actualizes a Marxist-feminist ontology, is essential to the development of a Marxist-feminist analysis of consciousness, learning, and praxis. Institutional ethnography (IE) is a method of inquiry that actualizes the ontology and epistemology developed by Marx and Engels in 1846 in *The German Ideology* (1968) and offers us an empirical method for discovering the relations of praxis and consciousness within the everyday organization of learning and social relations. In what follows, we will situate IE within the broader field of research into consciousness in educational scholarship, before expanding on our understanding of IE as an approach to inquiry. We will conclude with some insights into how IE can be used by revolutionary scholars and activists.

Critical Educational Inquiry Into Consciousness/Praxis

Critical educational researchers have developed a variety of approaches to empirically describe and establish the characteristics of the “learning” associated with processes of politicization or, as often described, conscientization. Beyond the field of critical pedagogy and its focus on cultural forms, critical education researchers have been primarily interested in the various kinds of learning, from political to practical, that emerge from participation in social struggle and social movements (Choudry, 2015; Curnow, et al., 2019; Foley, 1999; Hall et al., 2011; Holst, 2011). The interest in politicization or radicalization extends to critical consciousness raising associated with modes of popular education and participatory action research (PAR), including feminist and youth participatory action research as well as community-based participatory research (Camarota & Fine, 2008; Kapoor & Jordan, 2009; McIntyre, 2008). Since the emergence of PAR in the 1970s, it has become a common methodological approach to studying the development of critical consciousness, although phenomenological, ethnographic, life history, critical discourse analysis, and ethno-methodological approaches are also frequently used. Transformative learning theories, associated with both Mezirow (1991, 2000) and O’Sullivan (1999), have also produced articulations around “critical consciousness.” Mezirow’s perspective framework is perhaps the most fully realized psychological approach to the question, while O’Sullivan’s vision relies more heavily on spiritual dimensions of self and collectivity.

Perhaps of more significance than the approach to data collection has been the particular epistemologies and ontologies deployed by researchers that guide their conceptualization of what learning “is” and what it “looks like” in politicized processes. A guiding assumption of this diverse field is that through participation or engagement in some process of social contestation, new forms of consciousness can and do emerge. A major difficulty for researchers has been dealing with problems of categorizing some forms of consciousness as “false” or “critical,” thus demonstrating a lack of differentiation between a formulation of consciousness *per se* and class consciousness as a collective expression of praxis (Allman, 1999; Ollman, 1987). The danger here is to reduce consciousness and praxis to its thought content, rather than recognizing a constructive epistemological position. This reduction can only be addressed through an emphasis on the relationship between human practice and forms of consciousness. There are various ways to address this necessity, one of which is through attention to *human activity*.

In recent years, cultural historical activity theory (CHAT) has emerged as a framework for the exploration of critical learning, primarily in workplace settings (Engeström, 2001; Sawchuk et al., 2006). CHAT has attracted educators working in critical traditions in part because of its claims to account for processes of learning, change, and struggle. In the CHAT framework, the primary object of analysis is an activity system that is assumed to be social, or collective, in nature, oriented toward material conditions and processes, mediated through artefacts, and involving historicity. Activity systems evolve through human practice and contain multiple contradictions, which are seen to drive change and development in the system. These contradictions in activity systems can cause more profound agitation, leading to potential transformation in which some individuals may orient themselves in opposition to the relations of power, thus leading to possibilities for collaboration, learning, and struggle, and ultimately generating new activity systems and new forms of knowledge. CHAT draws heavily from traditions in Marxism aimed at developing a materialist social

psychology, namely from Vygotsky. This psychology understands individual consciousness as embedded in social relations and forms of social consciousness. Changes in objective conditions present in activity systems are understood to be a means to overcome forms of alienation and produce changes in consciousness.

CHAT has been subject to some expansive critique (Avis, 2007; Jones, 2009; Langemeyer & Roth, 2006; Warmington, 2008). The primary objections have focused on two problems in the ontology of the approach. First, critics have argued that CHAT misunderstands and de-historicizes Marx's theorization of capitalism by introducing the concept of activity. By articulating "activity" as the "germ cell" of social analysis, as opposed to Marx's germ cell of the commodity, CHAT theorists have erased both social relations and history from their understanding of human activity. Activity as "species character," within the CHAT framework, is disconnected from modes of production and focuses only on human activity as simply activity, and thus as ahistorical activity. The second critique has argued that, given CHAT's starting point in "activity," the framework misunderstands the fundamental contradictions of capitalism. This critique positions CHAT as unable to meet its own claims, particularly concerning critical learning and consciousness in workplaces, because it does not understand central contradictions in the formulation of labour power in capitalism, including use-exchange value and labour-capital. CHAT is only able to address peripheral contradictions and is thus reformist in its tendencies. Further, CHAT's arguments concerning alienation do not draw from a robust understanding of labour power, thus reinscribing fragmentation rather than overcoming it.

A deeply important element of this critique has been introduced by Colley (2010), who offered a feminist analysis using Marx's dialectical tools of essence and appearance. Colley argued that this ahistorical construction of activity in CHAT is actually an abstraction in which activity as a "species character" is understood as absolute and thus is only able to engage with the appearance of activity. Activity, she argued, is never abstract or neutral; it can only be understood as human labour transformed through capitalism into a kind of "unfree" activity sold on the commodity market as labour power and so exploited. In this process, labour becomes not just human activity in contradiction with capital, but becomes capital itself. This essential, dialectical contradiction is not easily visible. Colley's (2012) critique was developed in the context of her work on emotional labour performed in the politics of care in public services. Further, Colley (2015) argued that there can be no form of labour or activity that is not gendered or racialized within the relations of patriarchal, racist capitalism, and thus CHAT begins with assumptions that do not allow for the complexity of social relations to become visible. Finally, in her response to other critiques of CHAT, Colley reiterated that its problems lie not in the type of data it produces, but in the ontology and epistemology embodied within. She redirected our attention to the lived experience of women workers and positioned their standpoint as the entry point of research.

Given some of the challenges, described above, in researching "consciousness," let alone critical forms, we argue that it is essential to embrace a feminist historical materialist epistemology and ontology for research. Dorothy Smith best formulated the extension of this foundation into an approach for research through her articulation of institutional ethnography.

The Approach of Institutional Ethnography

According to Smith (1990), many forms of inquiry in the social sciences begin in what Marx and Engels (1846/1968) called “the hegemony of the spirit,” meaning that these forms of inquiry begin with fundamentally idealist assumptions. Idealist ontology, which even today can be situated in the myriad responses by researchers to positivism in the social sciences, is the belief that social reality is brought into being through human consciousness. This perspective “never manages to conceive the sensuous world as the total living sensuous activity of the individuals composing it” (p. 42). Social reality remains in the realm of ideas as the driving force of history, rather than, as Marx and Engels propose, the material activity of individuals participating in historically specific social relations and cooperation.

It is difficult to make sense of a social reality that is presumed to exist only in the minds of people, a social reality ossified into conceptual categories such as “structures” and “systems.” In *The German Ideology* (1846/1968), Marx and Engels detailed these processes as the three tricks of ideology, and Smith (1990) adopted their analysis in her critique of sociology. Marx and Engels (1846/1968) famously argued,

First of all, an abstraction is made from a fact; then it is declared that the fact is based upon the abstraction...For example: *Fact*: The cat eats the mouse. *Reflection*: Cat—nature, mouse—nature, consumption of mouse by cat = consumption of nature by nature = self-consumption of nature. *Philosophic presentation of the fact*: Devouring of the mouse by the cat is based upon the self-consumption of nature. (p. 542)

This somewhat sarcastic example highlights the relationship between material processes, their abstraction and capture in categories of thought, and the active, human process of thinking behind this “presentation of the fact.” For Smith, idealist inquiry begins when the researcher identifies an actual phenomenon in the social world. The researcher collects data on this topic, usually by studying people conceptualized as atomized “individuals.” This data is then taken as evidence abstracted from the conditions under which it was generated. This typically happens by using a preconceived interpretative framework to make sense of the data or even just hidden ontological assumptions on the part of the researcher, which creates a separation between an individual and the social relations that constitute their life. The data is then arranged to make sense in the context of the framework. Marx and Engels (1846/1968) referred to this process as making “mystical connections” (p. 64). Finally, the resulting arrangement is translated into an idea, which in turn is given the ability to direct relationships between other concepts, such as causality or correlation. This method of reasoning was identified by Marx and Engels as ideological in the sense that it relies on abstractions from social reality to generate its claims. This sense of ideology as an epistemological process (Allman, 1999, 2001; Smith, 1990) is quite different from the sense of ideology as an oppressive system of ideas (Brookfield, 2001). Ideology here is understood in its negative sense, as an epistemology based on the abstraction of experience and knowledge from material and social conditions; it is negative not in the sense that it is “bad,” but as an active negation of material relations as actual human practice and forms of consciousness. In other words, the negation of praxis.

Ideological reasoning and idealist ontology result in the generation of theoretical concepts and frameworks. Theories and concepts “as such are not ideological. They are

ideological by virtue of being distinctive methods of reasoning and interpreting society" (Smith, 1990, p. 36). This is not to say that categories and concepts do not become laden with relations of power. Rather, ideological reasoning is a way to remove power from our modes of analysis by rendering invisible the actual social and material contradictions that shape our lives. And yet, ideological categories frame our understanding of reality and seem, in many ways, "commonsense." Marx and Engels (1846/1968) were puzzled as to how these concepts hold such sway and recognized that ideological categories, despite processes of abstraction and mystification, have resonance with actual experience. As such they are important. Smith (1990) described categories in this way:

Concepts, ideology, and ideological practices are integral parts of socio-historical processes. Through them people grasp in abstraction the real relations of their own lives. Yet while they express and reflect actual social relations, ideological practices render invisible the actualities of people's activities in which those relations arise and by which they are ordered. (pp. 36–37)

The problem with these categories is that they leave undisturbed the ground on which they are built. The social relations that give rise to certain experiences are not the subject of inquiry; instead, inquiry is confined to the manipulation of concepts, hyper-attention to modes of interpretation, and speculation on the part of the researcher. The result is the entrenchment of the interpretive domain in social inquiry, a fetishized concept of experience, torn from its inherently social character and driven by hidden theories. Theory, not experience, is used to make sense of the world, and our sense of the social world as a historical project with real social relations is lost.

This process raises numerous difficulties, both epistemologically and politically. On one level there is the simple issue of perpetuating ideological understandings of the world and the unequal social relations they normalize and obscure. For Smith (1990), this was an obstruction of inquiry. There is also the problem of objectification. One of the central questions driving Marx was the issue of how it is that human relations come to be used "over and against" individuals. How is it that something that is merely organized human relations becomes understood as a "structure" or "system" that dominates and dictates human experience? Further, how is it that people become active participants in their own subjugation? The experience of objectifying social relations in our consciousness is a result of ideological reasoning. Of equal concern to Smith were the results of these practices on epistemology, particularly as it relates to the experience of women. The alienation of experience and material reality present in traditional forms of social inquiry serve to subjugate women's experience in the world by erasing their materiality from what is known. The result is a sociology that explains away the experiences of women rather than accounting for their actual realities within social relations. Thus, ideological distortions, in the epistemological sense, become ideological distortions used for the purposes of social power (Smith, 2005). This key differentiation in the conceptualization of ideology is of the utmost importance to critical adult educators (Allman, 1999, 2001; Carpenter & Mojab, 2017).

The Ontology of Institutional Ethnography

As an alternative to these processes, Smith (1990, 2004, 2005) argued that social inquiry should begin with the ontology explicated by Marx and Engels in *The German Ideology*

(1846/1968). Marx and Engels proposed that social inquiry should begin in the real, material processes of life, meaning that inquiry should be directed at actual individuals and their actual experiences and practices. From this perspective, our social reality is known not as the abstraction “society,” but through categories that explain how people actually work and relate, as well as how consciousness is formed through this social activity and acts to change human practice. Therefore, ideas, theories, and categories arise not only through abstraction, but also through rigorous analysis of human social relations and the material world (Allman, 1999). The individual and the social are dialectically related, meaning that individual action and consciousness have an inner connection with the social totality.

This ontology is taken up through the project of institutional ethnography. Our argument is that separating the social/institutional organization of relationships from actually embodied consciousness results in a misreading of institutional ethnography (see Wright & Rocco, 2007). The problem faced by Smith was the question of how to actualize inquiry into this conception of the social. Given our entrenchment in the abstractions and mystifications of traditional forms of inquiry, how do we go about revealing the ideological distortions in our thought and understanding the social relations in which we are bound up? Smith’s answer was to begin by making “the ontological shift.” This shift requires the researcher to work from a definite understanding of the social, which Smith defined as individuals plus their doings plus coordination (Smith, 2007). Working from this definition, based in Marx’s ontology, inquiry must focus on individuals and their actual experiences and practice in relation with others, understanding that their experience and practice is always already historical. It is both an experience of historically produced forms of social praxis and an experience of making social praxis. The emphasis on how texts coordinate praxis within institutional ethnography allows us to hold the past, present, and future in dialectical relation with one another. In making this shift, we move away from understanding the social world as a collection of concepts divorced from people’s everyday experience. In order to do this, researchers must begin with the everyday; they must begin with a question as a point of entry, and it must be something that the researchers care about. This point of entry is referred to in institutional ethnography as the problematic. This problematic must be created from a standpoint. The standpoint “creates a point of entry into discovering the social that does not subordinate the knowing subject to objectified forms of knowledge of society or political economy” (Smith, 2005, p. 10). Standpoint serves as a tool to keep the researcher oriented to the subjective position of experience and the real material and social conditions through which subjects experience and make sense of the world. It is only from this embodied subject position that the “relations of ruling” become visible (Smith, 1997). We examine this concept in the next section. Standpoint, however, is not a phenomenological condition. Other theoretical inscriptions of the embodied subject can lead the researcher away from the actual experiences of the individual in their social world and toward a priori theoretical frameworks. Rather, Smith argued, standpoint

commits us to beginning in the local historical actualities of one’s experience. From this site we can see theories, concepts, and so on, as themselves in and of people’s activities, indeed as themselves practices that people bring into play in the ongoing organization of subjectivities that is integral to coordinating activities. (p. 129)

From this perspective, experience is understood as disjunctive social relations (Smith, 1987) and as "the crucible in which the self and the social world enter into a concrete union called 'social' subjectivity" (Bannerji, 1995, p. 86). The feminist orientation of standpoint theory, when used in an explicitly Marxist framework, allows adult educators to see that human agency and consciousness are integral components of the social organization of social relations (Gorman & Mojab, 2008).

Ruling Relations, Discourses, and Texts in Institutional Ethnography

It is important to remember that the historical condition of Marxist ontology is the understanding that social relations and social reality are not necessarily of one's own making, but take place under conditions of historical necessity (Marx, 1979). Individuals work within historical processes, inheriting material and social relations from the past. Thus, individuals must constantly contend with history and with the understanding that their thinking and being take place within a larger mode of social relations. Using the language of Smith's (2007) definition of "the social," there is some social mechanism through which human relations are coordinated and organized. This mechanism, however, is not an abstract entity such as a "structure," but, like capitalism, is itself a process and a relation. Here Smith (1999, 2005) built on Marx and identified this "something" as ruling relations.

The concept of ruling relations is the subject of much confusion among readers of institutional ethnography. Given the emphasis on institutions and texts, ruling relations are sometimes mistaken for bureaucracy, individuals, the texts themselves, or the discourses contained therein. Ruling relations are not things, systems, or people, nor is it a concept equivalent to domination or hegemony. The concept of ruling relations runs contrary to a structural ontology that reifies power as somehow outside of human social relations. Given Smith's emphasis on Marxist ontology, the ruling relations are a "complex of objectified social relations that organize and regulate our lives in contemporary society" (Smith, 1999, p. 73). Smith (2007) also referred to "the ruling relations" as "the relations that rule" or "relations of ruling" in order to dispel an interpretation of ruling relations as a top-down hegemonic exercising of power or of "structures" external to human social organization. Please note also her use of "objectified social relations," not objects. Ruling relations are "forms of consciousness and organization that are objectified in the sense that they are constituted externally to particular people or places" (Smith, 2005, p. 13). They are collaborative social relations and forms of consciousness that have taken on the character of existing both inside and outside individuals; they are relations that arise through ideological mechanisms. Ruling relations "take on" this character because we actively and consciously reproduce them as such through forms of praxis.

In institutional ethnography, the concept of the ruling relations is closely tied to the notion of discourse. "Discourse" is a loaded term in the social sciences, and we will state from the beginning that Smith's conception of discourse is quite different from its other usages. Discourse, for Smith (2007), stems from looking at how social relations, individual actions, and consciousness are organized in a particular way. More popular notions of discourse, typically following Foucault, conceptualize discourse as forms of power embedded in language—in particular, acts of speaking, statement, and text (Palmer, 1990). This form of discourse, however, still locates knowledge outside individuals and their experience, as it acts to impose particular subjectivities on individuals (Bannerji, 2003; Smith, 2005).

Smith (1999) discussed this form of discourse as important to the study of ruling relations. From her perspective, Foucauldian discourse analysis explicates a particular dimension of the ruling relations, and it can be seen as a complementary process to textual analysis in institutional ethnography (Smith & Schryer, 2007) as it “captures the displacement of locally situated subjects” (Smith, 1999, p. 80). However, this form of discourse

leaves unanalysed the socially organized practices and relations that objectify, even those visible in discourse itself. Its constitutional rules confine subjects to a standpoint in discourse and hence in the ruling relations. They eliminate the matrix of local practices of actual people that brings objectification of discourse into existence. (p. 80)

For institutional ethnographers, discourse refers not just to language or images, but to the totality of social relations mediated by texts (Smith, 2007). A discourse is not an entity of knowledge existing outside individuals; rather, a discourse is a particular arrangement of social relations in which people are active participants. This difference is best explained in Smith’s (2005) discussion of institutional discourses. These are discourses embodied in particular institutions or complexes of social relations. An example might be the discourse of teacher-student relationships. This discourse coordinates activity in the institutional setting of the school, but it also organizes relations between individuals and knowledge. It is embedded with relations of power and domination, but it is a discourse that teachers, students, parents, administrators, politicians, and the general community participate in every day. We enact this discourse and bring it to life; it organizes our consciousness and activity. Discourse can be understood as the particular arrangement of social relations coordinated and organized through ruling relations. When institutional ethnographers begin their inquiry with a problematic, they develop this problematic in concert with critical reflection on their own location within a discourse, a location also known as standpoint.

It was Smith’s contention (1999, 2005) that discourse and ruling relations are observable through the ways in which they appear in talk, texts, and institutional processes. Institutional ethnography maintains a special and dynamic focus on texts as the central mediating body of ruling relations. Ruling relations are embodied in texts, whereas the historical development of a text-mediated society centred texts as the means through which the relations of ruling are concretized. Smith (2005) saw textual mediation—now including digital technologies—as an essential component of the contemporary world. It was Smith’s contention that contemporary society has developed into a social reality dependent on texts for communication, organization, and regulation, which is to say large-scale coordination of multiple locals. Historical developments in technologies, particularly print and now computer technologies, allow for the mass replication of texts across time and space, thus instilling in texts a regulatory function across multiple local sites of activity. Texts produced in a particular site serve to coordinate social relations across many sites, ultimately tying together the *local* and the *translocal*. Some texts create textual communities through which individuals are organized based on a common interpretation and significance attached to text (Smith & Schryer, 2007). Religious bodies associated with core texts (the Bible, the Koran, the Torah) would be examples of these textual communities. Texts are also produced by people in institutional contexts and operate through institutional processes to coordinate social relations. Texts embedded in institutions and the institutional discourses they create are the primary focus of institutional ethnography. These texts almost take on a life of their

own. According to Smith (1999), "the materiality of the text and its replicability create a peculiar ground in which it can seem that language, thought, culture, formal organization, have their own being, outside lived time and the actualities of people's living" (p. 79). This understanding of texts makes clear the relationship between the way texts function in society and the objectified consciousness of the ruling relations.

Smith used the term "text" in a broad manner. The term does not refer only to written language, but also to other forms of representation, including images, that are replicated and used across multiple sites. Smith also rejected post-structuralist theorizing on texts that places them solely within the interpretive realm, in that texts are actual things that exist in an actual space. They are taken up by readers at different times and activated in different ways. Texts exert a regulatory capacity, but they are much more than sets of rules or directives that readers blindly follow. Smith and Schryer (2007) argued that:

Co-ordinating people's doings through the multiplication of identical texts takes for granted that a given text will be interpreted in different local contexts. Texts penetrate and organize the very texture of daily life as well as the always-developing foundations of the social relations and organization of science, industry, commerce, and the public sphere. (p. 116)

In this way, texts function in a manner similar to the ways Marx and Engels (1846/1968) described abstract conceptualizations helping to order consciousness. But texts go beyond this function in that they also organize behaviour and coordinate action. Ellen Pence's institutional ethnography on domestic violence demonstrated this dual process (in Smith, 2005, pp. 170–173). Through her research, Pence (2001) showed how texts used by police and domestic violence intervention practitioners, in the course of domestic violence adjudication, not only shape their consciousness on gender-based violence, but also coordinate their actual practice of policing these offences, resulting in a situation in which "the focus of workers is detached from the reality of what it means for a woman to live with someone who beats her" (p. 221). Texts function as the carriers of institutional discourses, making explicit the ways in which individuals are "hooked in" to larger social relations through these institutional processes.

Texts, and institutional texts in particular, are used as organizers and coordinators of social relations. This is the very process described by the concept of ruling relations. Based on Smith's (2005, 2007) understanding of texts, it is clear that texts play an integral part in the formation of institutional discourses (also Smith & Schryer, 2007). Institutional discourses are embodied and enacted through texts. However, Smith cautioned us not to interpret these relations as ones in which discourses and texts dictate activities. Rather, we should see discourses and texts as "providing the terms under which what people do becomes institutionally accountable" (Smith, 2005, p. 113). They frame activities, agents, subjects, behaviours, and relations only in institutional terms, using institutional categories. This ideological process again obscures and evacuates individual experience and the "hooking in" of peoples' activities within social and material relations of ruling. In this way, institutional texts and discourses produce regulating discourses. Explication of a given regulating discourse and the mapping of its associated social relations are crucial goals of institutional ethnography.

Institutional Ethnography as Approach, Not Methodology

Dorothy Smith (2005) was very clear that institutional ethnography was not a methodology, and she went so far as to assert that it was also not a theory. It has become clear through discussions with a wide variety of researchers, in seminars and at research conferences, that the claim that institutional ethnography is not a theory nor a methodology but an approach is the source of much confusion and debate. To be clear on our terms, Smith was using “methodology” to refer to a way of conducting research that brought with it a predetermined framework for analyzing and interpreting data. Furthermore, we believe she used “theory” in its ideological sense, as in theory generated through the abstraction and generalization of experience from social and material relations. Confusion arises because researchers (1) are grappling with the positivist legacy that leads us to believe that our research methods are “neutral” and “objective”; (2) have not fleshed out the entrenchment of ideological modes of reasoning in our approaches to research; and (3) focus our inquiry on concepts rather than people’s organized and coordinated “doings.”

If we understand that institutional ethnography is built on a foundation of Marxist-feminist ontology and epistemology and, as such, is an approach to *inquiry* that rejects ideological reasoning, emphasizes materialism, and seeks to undo the objectification of the subject in processes of inquiry, then we will see that institutional ethnography is a process that makes social organization visible but does not explain why those social relations exist. Bertell Ollman (1993) perhaps made this distinction when describing Marx’s dialectics as a method:

Dialectics is not a rock-ribbed triad of thesis-antithesis-synthesis that serves as an all-purpose explanation; nor does it provide a formula that enables us to prove or predict anything; nor is it the motor force of history. The dialectic, as such, explains nothing, proves nothing, predicts nothing, and causes nothing to happen. Rather dialectics is a way of thinking that brings into focus the full range of changes and interactions that occur in the world. (p. 10)

Institutional ethnography, of which Marx’s dialectical ontology is a core component, must be conducted in this same fashion. It gives us the tools to see, to actualize an understanding of the social that otherwise remains hidden under layers of ideology and mystification. In this way it is not an explanatory theory; it is not a framework for interpreting the social. It is a framework for conceptualizing the social. Because of this, we need theory, but we have to be very careful; we do not need theory based on ideology. We need theory generated through the rigorous empirical work of dialectical historical materialism. This is one reason why we advocate for an explicit and vigilant Marxist-feminist reading of institutional ethnography.

Researching Praxis Through Institutional Ethnography

Institutional ethnography directs research toward social phenomenon existing below the surface of appearance. As we previously discussed, research in education often struggles with what Smith (2005) described as either the absence of or overemphasis on the individual. Institutional ethnography offers a way out of this dilemma by situating inquiry within the daily experiences of individuals, their practices, and their work while attempting to locate their individual practice within larger institutional discourses and social relations at the

same time. This allows us as researchers to see the ways in which discourses and social relations coordinate and organize educational and epistemological relations. It allows us to see the ways in which these relationships impact, shape, and, in turn, are shaped by educational practice, particularly in terms of pedagogy and curriculum. It also allows us to see, at the ground level, the pervasiveness and contradictions of ideological reasoning and ideological explanations, particularly with regards to education as a solution for social inequality in liberal capitalist democracies. Most importantly, institutional ethnography provides us with a concrete tool for exploring the intricacies of consciousness and praxis.

Our interest in critical education overlaps with our examinations of liberal democracies, particularly the ways in which states engage in a politics of "citizenship" and "democracy." Our interest in this area focuses on the ways in which states promote particular formations of political subjectivity among their citizenries, how these discourses are enacted through educational programming, what ends these formations are directed toward, and what formation of consciousness results from these social arrangements (Carpenter & Mojab, 2011, 2017; Carpenter, 2021). Drawing from our own experience conducting research in the field of citizenship education and democracy promotion, we find that institutional ethnography provides windows into the limitations of current lines of inquiry and exposes questions that are otherwise obscured. In our experience, such current lines of inquiry began with a literature review. Literature on citizenship education tends to reflect sets of fighting polemics, with different groups arguing for their own version of the ideal citizen, often by attempting to provide empirical evidence of how these processes are learned. We observed very early on the ways in which this body of literature, while significant in its various contributions to knowledge, does not move beyond an idealist approach to citizenship grounded in methodological individualism. Further, the category "citizenship" is only understood as ideal articulation and not as lived social relation (Mojab & Carpenter, 2011; Carpenter, 2021).

Institutional ethnography turns the researcher's attention away from this quagmire and allows exploration of citizenship as an ideological category and citizenship education as an ideological practice. Our attention is redirected toward the actual social relations that comprise the category of citizenship. We are able to question not just how citizenship education instills certain paradigms of participation or democratic aspirations in learners, but also how the concept of citizenship organizes social relations and how that organizational form is supported through educational projects. Institutional ethnography allows us to explore in a deeper way the relationships between citizenship, the state, ideology, and democracy. The approach of institutional ethnography moves beyond questions of how one becomes a good citizen to questions of how citizenship education is hooked into other social relations such as gender, race, class, and nation. Attention is directed away from the abstraction of shaping political subjectivity and toward understanding how political subjectivity is shaped within existing social relations. Institutional ethnography helps expose contradictions in ongoing social relations, particularly racialized and gendered class relations.

To summarize, institutional ethnography as an approach to inquiry begins with Marxist ontology and rejects the ideological premises of traditional forms of social inquiry. It conceives of the social as coordination of ongoing human relations and activity. As such, the focus of inquiry is the mechanisms of coordination, understood as the ruling relations. Emphasis on the ordering of social relations and the dialectical relationship between social relations, consciousness, and material practices are at the centre of the project of institutional

ethnography. It is our contention that institutional ethnography offers a compelling path for inquiry in critical education. Institutional ethnography allows educational researchers to move away from individualized notions of learning that not only reinforce ideological reasoning, but also support a learning paradigm that colludes with the capitalist project of the entrepreneurial individual and its raced, gendered, and classed dimensions (Gorman, 2007). By using institutional ethnography to advance a Marxist-feminist understanding of consciousness, we can direct educational research toward explication of these dimensions and social transformation.

Theorists and practitioners of critical adult education have long focused our attention on raising or transforming the consciousness of adult learners. We have developed theoretical and pedagogical traditions such as transformative learning and popular education that work to implement this vision. We have taken far less serious consideration of how we come to understand the praxis of consciousness itself. We have often lapsed into working from the outside in, with results that many would find less than extraordinary. How can we move forward with a revolutionary educational project if we do not know how to understand consciousness empirically and not just theoretically? We can consider the value of institutional ethnography by returning to the purposes of critical adult education or perhaps even adult education in general. Calls for the return to the social purpose of adult education invite us to adopt new tools and approaches in our field that present us with the opportunities to move beyond top-down theorization or practice and away from our asocial indulgence in the self (Martin, 2008). A Marxist-feminist reading of institutional ethnography, as we have suggested, offers the potential to ground educational inquiry in the real experiences of learners in their social complexity and with the possibility of illuminating results.

References

- Allman, P. (1999). *Revolutionary social transformation: Democratic hopes, political possibilities and critical education*. Bergin & Garvey.
- Allman, P. (2001). *Critical education against global capitalism: Karl Marx and revolutionary critical education*. Bergin & Garvey.
- Avis, J. (2007). Engeström's version of activity theory: A conservative praxis? *Journal of Education and Work*, 20(3), 161–177.
- Bannerji, H. (1995). *Thinking through: Essays on feminism, Marxism, and anti-racism*. Women's Press.
- Bannerji, H. (2003). The tradition of sociology and the sociology of tradition. *Qualitative Studies in Education*, 16(2), 157–173.
- Brookfield, S. (2001). Repositioning ideology critique in a critical theory of adult learning. *Adult Education Quarterly*, 52(1), 7–22. <https://doi-org/10.1177/07417130122087368>
- Cammarota, J., & Fine, M. (Eds.). (2008). *Revolutionizing education: Youth participatory action research in motion*. Routledge.
- Carpenter, S. (2021). *The ideology of civic engagement: Americorps, politics, and pedagogy*. SUNY Press.
- Carpenter, S., & Mojab, S. (Eds.). (2011). *Educating from Marx: Race, gender, and learning*. Palgrave.

- Carpenter, S., & Mojab, S. (2017). *Revolutionary learning: Marxism, feminism, and knowledge*. Pluto Press.
- Choudry, A. (2015). *Learning activism: The intellectual life of contemporary social movements*. University of Toronto Press.
- Colley, H. (2010). *A rough guide to CHAT from an historical materialist perspective* [Lecture]. OISE/University of Toronto.
- Colley, H. (2012). Not learning in the workplace: Austerity and the shattering of illusion in public service. *Journal of Workplace Learning*, 24(5), 317–337.
- Colley, H. (2015). Labour power. In S. Mojab (Ed.), *Marxism and feminism* (pp. 221–238). Zed.
- Curnow, J., Davis, A., & Asher, L. (2019). Politicization in process: Developing political concepts, practices, epistemologies, and identities through activist engagement. *American Educational Research Journal*, 56(3), 716–752. <https://doi-org/10.3102/0002831218804496>
- Darville, R. (2014). Literacy work and the adult literacy regime. In A. I. Griffith & D. Smith (Eds.), *Under new public management: Institutional ethnographies of changing front-line work* (pp. 25–57). University of Toronto Press.
- Engeström, Y. (2001). Expansive learning at work: Towards an activity theoretical reconceptualization. *Journal of Education and Work*, 14(1), 133–156.
- Foley, G. (1999). *Learning in social action: A contribution to understanding informal education*. Zed.
- Gorman, R. (2007). The feminist standpoint and the trouble with “informal learning”: A way forwards for Marxist-feminist educational research. In A. Green, G. Rikowski, and H. Raduntz (Eds.), *Renewing dialogues in Marxism and education: Openings* (pp. 183–199). Palgrave Macmillan.
- Gorman, R., & Mojab, S. (2008). War, diaspora, learning, and women’s standpoint. In M. Hajdukowski-Ahmed, N. Khanlou, and H. Moussa (Eds.), *Not born a refugee woman: Contesting identities, rethinking practices* (pp. 135–149). Berghahn.
- Grahame, K. M. (1998). Asian women, job training and the social organization of immigrant labor markets. *Qualitative Sociology*, 21(1), 75–90.
- Gruner, S. (2012). *Learning land and life: An institutional ethnography of land use planning and development in a northern Ontario First Nation* [Unpublished thesis]. University of Toronto.
- Hall, B., Clover, D., Crowther, J., & Scandrett, E. (2011). Social movement learning: A contemporary re-examination. *Studies in the Education of Adults*, 43(2), 113–116.
- hampton, r. (2020). *Black racialization and resistance at an elite university*. University of Toronto Press.
- Holst, J. (2011). Frameworks for understanding the politics of social movements. *Studies in the Education of Adults*, 43(2), 117–127.
- Jackson, N. (1995). “These things just happen”: Talk, text, and curricular reform. In M. Campbell and A. Manicom (Eds.), *Knowledge, experience, and ruling relations* (pp. 164–180). University of Toronto Press.
- Jones, P. (2009). Breaking away from capital? Theorising activity in the shadow of Marx. *Outlines: Critical practice studies*, 11(1), 45–58.
- Kapoor, D., & Jordan, S. (Eds.). (2009). *Education, participatory action research, and social change*. Springer.

- Langemeyer, I., & Roth, W.-M. (2006). Is Cultural-Historical Activity Theory threatened to fall short of its own principles and possibilities as a dialectical social science? *Outlines. Critical Practice Studies*, 8(2), 20–42. <https://doi.org/10.7146/ocps.v8i2.2090>
- Martin, I. (2008). Whither adult education in the learning paradigm? Some personal reflections. In *Whither adult education in the learning paradigm? Proceedings of the Standing Conference on University Teaching and Research in the Education of Adults*, Vol. 38. University of Edinburgh.
- Marx, K. (1979). The eighteenth brumaire of Louis Bonaparte. In *Collected Works*, Vol. 11. Progress.
- Marx, K., & Engels, M. (1968). *The German ideology* (S. Ryazanskaya, Trans.). Progress. (Original work published 1846)
- McIntyre, A. (2008). *Participatory action research*. Sage.
- Mezirow, J. (1991). *Transformative dimensions of adult learning*. Jossey-Bass.
- Mezirow, J. (Ed.). (2000). *Learning as transformation*. Jossey-Bass.
- Mojab, S., & Carpenter, S. (2011). Learning by dispossession: Democracy promotion and civic engagement in Iraq and the United States. *International Journal of Lifelong Education*, 30(4), 549–563.
- Ng, R. (1988). *The politics of community services*. Garamond.
- Ng, R. (1995). Multiculturalism as ideology: A textual analysis. In M. Campbell and A. Manicom (Eds.), *Knowledge, experience, and ruling relations* (pp. 35–48). University of Toronto Press.
- Ng, R., & Shan, H. (2010). Lifelong learning as ideological practice: An analysis from the perspective of immigrant women in Canada. *International Journal of Lifelong Education*, 29(2), 169–184. DOI: 10.1080/02601371003616574
- Ollman, B. (1987). How to study class consciousness, and why we should. *Insurgent Sociologist*, 14(1), 57–96. <https://doi.org/10.1177/089692058701400105>
- Ollman, B. (1993). *Dialectical investigations*. Routledge.
- O'Sullivan, E. (1999). *Transformative learning: Educational vision for the 21st century*. Zed.
- Palmer, B. (1990). *Descent into discourse: The reification of language and the writing of social history*. Temple University Press.
- Pence, E. (2001). Safety for battered women in a textually mediated legal system. *Studies in Cultures, Organizations, and Societies*, 7(2), 199–229.
- Sawchuk, P., Duarte, N., & Elhammoumi, M. (Eds.). (2006). *Critical perspectives on activity: Explorations across education, work, and everyday life*. Cambridge University Press.
- Shan, H. (2009). Shaping the re-training and re-education experiences of immigrant women: The credential and certificate regime in Canada. *International Journal of Lifelong Education*, 28(3), 353–369. DOI: 10.1080/02601370902799150
- Smith, D. E. (1987). *The everyday world as problematic: A feminist sociology*. University of Toronto Press.
- Smith, D. E. (1990). *The conceptual practices of power: A feminist sociology of knowledge*. Northeastern University Press.
- Smith, D. E. (1997). From the margins: Women's standpoint as a method of inquiry in the social sciences. *Gender, Technology, and Development*, 1(1), 113–35.
- Smith, D. E. (1999). *Writing the social: Critique, theory, and investigations*. University of Toronto Press.

- Smith, D. E. (2004). Ideology, science, and social relations: A reinterpretation of Marx's epistemology. *European Journal of Social Theory*, 7(4), 445–462.
- Smith, D. E. (2005). *Institutional ethnography: A sociology for people*. AltaMira Press.
- Smith, D. E. (2007, August 17–19). *Institutional ethnography* [Workshop]. Ontario Institute for Studies in Education at the University of Toronto.
- Smith, D. E. and Schryer, C. F. (2007). On documentary society. In C. Bazerman (Ed.), *Handbook of research on writing: History, society, school, individual, text* (pp. 113–127). Lawrence Erlbaum.
- Warmington, P. (2008). From "activity" to "labor": Commodification, labour-power, and contradiction in Engeström's activity theory. *Outlines: Critical practice studies*, 10(2), 4–19.
- Wilmot, S. (2011). *The social organization of the Ontario minimum wage campaign* [Unpublished thesis]. University of Toronto.
- Wright, U. T., and Rocco, T. S. (2007). Institutional ethnography: A tool for interrogating the institutional and political conditions of individual experience. In L. Servage and T. Fenwick (Eds.), *Joint international conference of AERC and CASAE: 26th National Conference* (pp. 643–48). University of Nova Scotia.