Pearls on Positionality and Reflexivity: from a Humbled PhD Student

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ABSTRACT

The purpose of this essay is to share the positionality and reflective experiences of a PhD student and to highlight lessons learned through the process. Continued attention to positionality and active reflection, makes for deep scrutiny in graduate education, and to the development of a future qualitative researcher. The research tools of positionality and reflexivity are discussed and how a pivotal experience triggered the process of actively engaging in reflexivity. Key lessons learned, and methods of active reflection are discussed with the intention of encouraging graduate students, as well as established researchers, to recognize the importance of positionality and active reflection in the entire research process.

Introduction

This personal essay explores certain ‘aha moments’ related to positionality and reflexivity, encountered as a PhD-Nursing student. I discuss how I gained insight into my view and internalization of the world. This has practical implications in many aspects of graduate studies, and not just within the confines of a writing assignment or an obligatory 'lip-service' paragraph in final thesis. Being genuinely reflexive should start early in graduate education, certainly before engaging in actual research. Continued attention to positionality and active reflection makes for deep scrutiny in graduate education, and to the development of a would-be researcher. I share my experience and lessons learned, in the hope that other students might be further motivated to embrace the practical value of exploring and understanding their positionality and to practice active reflection.

What are Positionality and Reflexivity?

PhD programs teach students about positionality and reflexivity as an essential element in learning and preparing to conduct research, particularly qualitative research (Holmes, 2020). Students are encouraged to discover and describe their positionality. Positionality refers to identifying, understanding and clearly articulating the place from where one sees and interprets the surrounding world (Holmes, 2020; Wilson et al., 2022). It is incumbent upon the researcher to recognize that their views, values, assumptions and beliefs are influential in planning, engaging and interpreting research (Holmes, 2020). A clear positionality statement allows those reading the research to assess how the participants, topic and research process are ‘situated’ in context of the researcher themself. This subjectivity has an impact on the researcher’s relationship and interactions with study participants (Olmos-Vega et al., 2023). Furthermore, data interpretation is necessarily filtered through the researcher’s subjective lens (Haverkamp & Young, 2007); past experiences, assumptions and literature reviews may all affect analysis and purported conclusions (Creswell & Poth, 2018).

Reflexivity is an honest account and communication of positionality, which requires an exploration of critical thinking and self-reflection (Jacobson & Mustafa, 2019; Wilson et al., 2022). It requires one to actively question and probe one's positionality and then to clearly communicate or articulate how it might influence the research process,

and if need be, mitigate any untoward consequence. By using both positionality and reflexivity (Mitchell et al., 2018), a researcher can appreciate areas of potential bias and how this could pre-emptively guide and shape their interactions and interpretations during the research process (Holmes, 2020). Additionally, the stated positionality and reflexivity are important elements of rigor when conducting qualitative research (Johnson et al., 2020).

My Positionality

I summarize below how I understood and articulated my positionality at the start of my graduate studies, and how that initial understanding was challenged as I immersed myself in the literature of a preparatory phase of a particular project. The concepts of positionality and reflexivity were introduced early in my PhD program as a fundamental component of both qualitative and quantitative research courses. As I progressed, I had pause to think and further reflect on my positionality, through robust discussions with professors and peers, and through the academic writing of assignments.

At the outset, I was able to clearly declare myself as a Caucasian, cis-female, middle-class, experienced primary health care nurse practitioner (NP). I have spent the majority of my 23 years as an NP, working in Ontario, Canada, in both primary and acute care settings, and as part of interprofessional teams of physicians, nurses and other healthcare professionals. Stating these professional experiences provided a frame of reference regarding the motivation for my interest of exploring the professional relationship of NPs and physicians in primary care. As I reflected on this stance, I adjudged that my position as a member of this professional group could influence many aspects of the research process. I would be considered both an insider by the group I was investigating as well as an 'outsider' in my role as researcher (Moore, 2012). This 'insider-outsider' dichotomy dictates an established understanding of the tacit knowledge and nuances of the dyad. I recognized prior experiences as potentially beneficial; they might ease access and assist with recruitment, as I would know the right players and was actually "one of them". However, I also acknowledged the potential negative consequences of an insider position; perhaps some physicians might not share tensions that they have with NPs, as I am one myself. By announcing this positionality, I was affirming that I would strive to ensure that I would address insider-outsider duality through all the research stages. As I reflected on my stated positionality, I appreciated that I have been fortunate to have had positive working relationships with most physicians and prided myself, perhaps naively, that I had avoided adversarial stances when working with them. At the time of working on positionality in the early stages of course work, I did not feel that I had any negative views, experiences or problems in how I perceived physicians. I had no inclination that I harbored hidden negative feelings about my professional relationships with physicians until I began my reflection. Certainly, I had no indication that such might be uncovered, catching me off guard, and thus allowing me to better appreciate the existence of my inherent bias.

The "Incident"

After completing my graduate courses, I immersed myself in the literature, preparing a reading list for my upcoming Comprehensive Examinations. I was working through a large volume of articles and came upon a particular research paper, titled: "Physician Use of Health Care Teams for Improving Quality in Primary Care" (Hoff & Prout, 2019), which piqued a feeling of irritation. The title 'bugged me' but I started reading without giving any consideration to the emotion that it elicited. As I read, I became progressively irritated, highlighting excessively and scribbling angry responses in the margins of the paper. I was particularly annoyed with the suggestions that physicians control the team members: "the physicians determine how other members in the team function…the doctors give cues to team members for how to think about and perform their duties" (Hoff & Prout, 2019, p.121). Eventually I got so angry at the text, that I had to set the paper aside. Why did this article evoke such a response in me? I had read a great number of papers and thus far none had elicited such a reaction. I decided to take a break from reading, and left the paper, heavily highlighted, underlined in red, and slightly crumpled, on my desk. Despite the short reprieve, the content, my

understanding of it and particularly my emotional response to it, persisted in my thoughts. I was forced to acknowledge that there was more to this than just reading something that irritated me. I felt blocked- that I could not get past this feeling. I needed to dig deeper to understand the emotion elicited and what was at the core of such a strong response. In retrospect, I now felt embarrassed that the paper had stirred up such a strong feeling, since I believed my approach to research, up until this point, had been rational and logical.

My Active Reflexivity

Realizing that my reaction to this particular article had been significant, and in an attempt to try and understand my response, I shared my reaction with my partner (a surgeon and PhD). As I discussed the content with him, it became clear that I harbored some antagonistic feelings regarding professional relationships with physicians, despite never having had any obvious negative interactions with physician colleagues. Perhaps I never took the time to reflect on situations with physicians to allow this possible belief to surface. This realization of having these negative beliefs was surprising to me, and the conversation prompted me to return and review a previous positionality assignment.

As I re-read it, I noted that there was nothing about the possibility of harbouring any negative emotions/attitudes to working with physicians. In fact, my contention had been only that physicians might not disclose *their* tensions and possibly hold back their true responses to me as an NP/Researcher. I had written that if my positionality or viewpoint had the potential to negatively influence the research process, I would ensure ongoing reflexivity, and implement tactics that might pre-empt or expose any inherent bias that might arise.

One such tactic was to leverage the wisdom of my PhD Supervisor. To ensure that I would engage in active reflection and acknowledge any untoward positionality influences, I would discuss issues arising during the research work with him. However, I had thought that this would occur when I was *actively engaging* in the later work phases of the research project (interviewing participants or deciphering and interpreting the emerging data), not in an initial literature review.

In the weekly meeting with my PhD supervisor, who is also an NP, I shared the paper title, and summarized the content. I disclosed that it had elicited an unanticipated and angry response. We discussed it further and it became clear that the article had unearthed a subconscious assumption about medical hegemony, a previously unacknowledged resentment towards potential/perceived medical dominance over nurse practitioners, and the assumed role of "physicians as the de facto leaders of primary care teams" (Hoff & Prout, 2019, p. 121). This was a true 'aha moment'. This newly discovered unattended assumption could have serious impact on my future research with physicians and nurse practitioners. We discussed how this belief had not surfaced before, and that if it had gone unacknowledged, what potential impact this could have had on my anticipated research. Could I have unintentionally communicated this aversion through non-verbal cues, as I interviewed them? Would I have encouraged negative responses from NPs regarding their experiences with physicians? Would this assumption have weaved its way into my interpretations of the interview data? We then discussed how to mitigate this newly uncovered bias and he suggested that I write about the experience. This process has been ongoing, ultimately resulting in this reflexive essay.

Prior to writing about and reflecting on my thoughts, I decided to re-read the 'offending' paper with less animosity and more curiosity. During the first read of the paper, blinded by emotion, I had misinterpreted and overlooked some of the fundamental aspects. Another 'aha moment' surfaced with the second read: when I was overcome with irritation during the initial review, that I had missed salient points of content. For example, a key point from the article was that physicians need to empower others in a health care team by being "willing to forfeit their absolute autonomy' (Hoff & Prout, 2019, p. 121). Additionally, this paper was written from the perspective of the physician's understanding of their part in health care teams. I have come to better appreciate that all points of views and opinions are valuable even when they conflict with my own. Through reconciling the initial emotional distraction, I was better able to grasp the value of the article. Had I not engaged in this process of active reflecting, this particular important piece of research would likely have been excluded from my review or misrepresented. When engaging with research

it is important to suspend judgement of content until reading is complete- and for that judgment to be based on content and substance, rather than rhetoric.

Lessons Learned

Firstly, I have come to realize that the early graduate education assignments, dialogues and energies directed towards positionality and reflexivity have real concrete practical importance. The process of explicitly articulating our perspectives, influences and means to reflect is a time-consuming activity, but it is a gift and a fundamental research tool. Dedicating time to think, committing to writing and articulating who we are, influences the what, how, and why we engage in research. I have come to appreciate that aspects of one's positionality, values and *unknown* (or hidden) assumptions, can surface at any point during the research process. Positionality is an ongoing, dynamic process that should be continually revisited (Holmes, 2020); reflexivity is the necessary exercise for *sustained* growth. Our positionality can shift according to the project, context, and over time as we mature as researchers: "no man ever steps in the same river twice, for it is not the same river and he's not the same man" (Heraclitus, as cited by Kahn, 1979).

Secondly, this experience demonstrated to me the practical value of *active* and continuous reflexivity. Reflecting is not passive; it requires meaningful and purposeful action. Instead of ignoring my thoughts and feelings regarding the Hoff & Prout (2019) article, I initiated conversations. I think that one should proactively attend to reactions, thoughts and feelings when they arise. Don't ignore nagging, bothersome feelings that surface as you engage with the literature, or in conversations as you delve into the research process. Don't be afraid to share negative emotions or uncomfortable responses. Put yourself in a position of *vulnerable self-scrutiny*. It will provide you with more clarity. Discuss such issues with supportive, trusted personal and professional allies, possibly from different sides of the divide (if there is a divide) i.e., one NP, one physician. Dialogue matters, as there are few truly lone wolves in research and there is worth in forthright dialogue and critical questioning. Value and utilize your relationship with your PhD supervisor; I am grateful that my PhD Supervisor created a safe space for me to share and discuss.

Furthermore, this experience has demonstrated the utility of writing. It takes time and energy, but writing provides a method to stretch thoughts, question ideas, formulate and gain clarity. Graham (2005) contends that "writing doesn't just communicate ideas; it generates them" (para.1). By discussing and then writing down my feelings, thoughts, experiences and responses, I provided myself with the opportunity to uncover previously unknown knowledge (Graham, 2022). Time is a precious commodity for a graduate student. But its investment in writing yields true dividends as well as a far deeper understanding of self and research.

Conclusion

As PhD students, we are exposed to a constant barrage (at times overwhelming) of learning opportunities in our research area and beyond. Coining, and extending the metaphor about seeing the wood for the trees: *the wood (which we cannot see for the trees) is always expanding*. I contend that *challenging* and *clarifying* one's positionality through active reflexivity, constitutes a fundamental touchstone in this learning process, helping not merely to set a context, but to anchor, albeit briefly, an identity in a shifting landscape. It gives us our critical reference point on an uncertain journey. It is intrinsic to personal growth, and to the research process. By sharing and writing about this foundational experience, I hope not only to become a better researcher but also to encourage other students to rethink and elaborate their positionality, and to commit to practicing active reflexivity.

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