
research

Critical theory, qualitative methods and the non-profit and voluntary sector: an introduction to the special issue

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Introduction

Over recent years, there have been moves to take what scholars have labelled a more ‘critical’ approach to studies of non-profit organisations, philanthropy and giving behaviours, and the wider voluntary sector (for example, [Eikenberry et al, 2019](#); [Coule et al, 2020](#); [Mirabella et al, forthcoming](#)). This ‘critical turn’ has come from a view of the subject area as failing to examine political, systemic and structural issues that may be shaping organisations and behaviours; instead, it tries to ‘reveal the most profoundly buried structures’ ([Bourdieu, 1996](#): 1) of the non-profit world.

By taking a critical approach, and drawing on feminist, queer, post-colonial or postmodern theories, we can identify sources of discrimination and injustice in the sector and identify ways of tackling them. Practically, these are messages that the non-profit sector – due to crises in safeguarding revealed by the Oxfam Haiti abuse scandal, or challenges to the lack of representation of people of colour in non-profit leadership roles – is increasingly aware of and indicates some increased willingness to act on. At a time of interlocking social crises – of welfare, democracy, inequality and more – theory can move from aloof observer to engaged friend ([Law, 2015](#)), helping us understand how what may be happening in a voluntary organisation today links to wider historical trends and social structures ([Mills, 1959](#)).

At the heart of much of this shift towards critical approaches has been a wider and greater belief in the value of qualitative research. Ontologically positioned to help reveal the socially constructed nature of social relations, and epistemologically critically realist or deploying interpretive ways of knowing, qualitative methods provide researchers with the tools to better reveal the ‘*verstehen*’ of people’s experiences and

practices and make direct links between action occurring within and outside non-profits. Sometimes unhelpfully seen as a challenge to hegemonic academic ideas, especially in certain disciplines, such as public administration, social work and business, where non-profit studies are generally located, applications of qualitative methodology supported by critical theory are used by some to pay attention to the everyday realities behind statistical relationships between quantitative variables (Alasuutari, 2010). Some, however, view qualitative methods as merely different methodological tools that serve to answer different research questions.

Fundamentally, critical approaches argue that if we *know* differently about society and its structures, then we are more likely to *do* differently (Eikenberry et al, 2019). Despite this, and as revealed by multiple panels at leading non-profit research conferences, doctoral candidates and newer researchers in the United States (US) (but sometimes elsewhere as well) have been frustrated by the lack of support for qualitative work in their disciplines, and that the value of this work gets overlooked. This is despite some of the most highly recognised scholarship in the field in recent years utilising both qualitative methods and critical theory, such as Eliasoph's (2011) ethnography of volunteering and Krause's (2014) interview-based exploration of aid agencies' logics of practice. While the environment for critical and qualitative work in Europe is generally seen to be much better, there still remains an esteem problem among policy makers and practitioners between supposedly 'hard' and 'soft' approaches to research, and within universities regarding privileging science, technology and maths disciplines above social sciences.

Further, while all researchers should be reflexive (Dean, 2017), qualitative studies are generally better at providing researchers with scope for reflexive work examining issues of positionality within data collection and analysis. The intimacy and embedded nature of qualitative work (Khan, 2011) creates ethical quandaries and dilemmas for researchers, which can themselves be explored and solutions realised through applications of critical theoretical frameworks. Finally, qualitative methods frequently offer better opportunities for non-hierarchical research relations, including participant and community-led research approaches, meaning we shift from 'research on' to 'research with' relationships. Such principles underpin efforts to decolonise research methods (Smith, 2013; Chilisa, 2019) and to employ accessible methods (Gauntlett, 2007) that ensure all people can take part in research projects. In this special issue we are pleased to present seven articles that use critical theory and qualitative methods to better understand the non-profit world.

Critical theory in non-profit and voluntary sector studies

If critical theory, as the commentator Stuart Jeffries (2016: 21) puts it, is designed to do anything, it is meant to challenge the official versions of history and intellectual endeavour. While most aligned with the Frankfurt School, critical theory also draws on diverse theoretical resources, from variants of Marxism and postmodernism, and by various social/intellectual movements such as feminism, queer studies, anarchism and social ecology (Coule et al, 2020). Critical theory focuses on the reflective assessment and critique of society and culture in order to reveal and challenge power structures to identify and overturn oppression. Critical theory in its very essence also seeks to make links between specifics and larger issues. Social structures such as capitalism, gender, race, sexuality and more, play out in the inequality (for example Eliasoph, 2013), racial discrimination (for example, Lingayah et al, 2020) and gendered violence

(for example, [Beaton et al, 2021](#)) seen in the sector. It is sometimes forgotten that the non-profit sector is not some abstract entity, operating according to its own rules, away from 'the rest' of life. Dominant themes and narratives affect what happens in non-profits, but also who gets asked to or is expected to volunteer, which organisations are successful at lobbying, how people experience the role of fundraiser – all are impacted by wider social issues, currents and inequalities, and theory gives us a common language to explain these. Critical theory, because it exists in a state across disciplines, is also well located to benefit non-profit and voluntary sector studies in that our subject similarly crosses disciplinary boundaries in how it is studied. With social policy, public administration, business and management, economics, sociology and political science (among many others), all laying claim to be a way to understand non-profit sectors and voluntary action, there is a need to use language and ideas that cross boundaries.

One role of the non-profit and voluntary sector is to challenge (unequal) existing power structures, and campaign for better societies and social justice, but with that comes a responsibility to undertake inward critique when sector behaviours and practices have become unthinking orthodoxies, which may be doing more damage than good. We, and the authors in this special issue, believe that critical theory is a vital tool in doing that work.

Critical theory has perhaps never been more important and has never been as much under attack. Multiple fronts have been opened up, part of a wider 'culture war' that sees theoretical ideas that seek to challenge doxa and hegemony as deviant and treasonous. In Poland and Hungary, gender studies has been a casualty of a new, avowedly 'illiberal' nationalistic politics, labelled a 'pseudoscience' by government ministers ([Grzebalska and Pető, 2018](#)). Longstanding theories about gender and identity in the United Kingdom have been suddenly transformed by critics into a 'gender ideology' that has brainwashed a generation of young people. Critical race theory, and its examination of institutional racism and race's position as a social construct, has been weaponised by right-wing politicians in the US in the wake of the Black Lives Matter movement, and misrepresented as a core ideology undercutting American history and society. The phrase 'cultural Marxism' has come to be used as a catch-all label on social media, to undercut, devalue or ignore any generally social-democratic idea or individual. In a way, the very idea of using social-scientific theories by some people to make sense of themselves and their world, in ways that other people disagree with politically or ideologically, is viewed or has been framed by others as some sort of conspiracist thinking. The fact that critical theory emerges from a largely Jewish set of academics and scholars in the Frankfurt School, and the anti-Semitic essence of much conspiracist thinking, should not go un-noted. It is easier to believe that one's opponents are victims to a predatory theory, rather than accept that society is changing, values are altering and you might be wrong about something. While some individuals may develop genuine concern about such approaches, evidence suggests that much of this noise and faux-concern emanates from a media framing of threats to existing values – if so, future attacks on theoretical ideas seem a solid (if unwelcome) tactic we will see more of.

Qualitative methods in non-profit and voluntary sector studies

Non-profit and voluntary sector scholarship is limited in its empirical analysis of the sector through a critical lens. Qualitative approaches provide room for such in-depth

analyses, of matters ranging from individual experiences to sector-wide structures. Critical methodologies acknowledge and account for the power differences among research participants and the power structures embedded in the research process. Hallmarks of empirical analyses engaging with critical methodologies are participatory data collection and reflexivity in the role of the researcher in each stage of the research process. As shown in the articles in this special issue, close interaction between the researcher and the researched makes room for research participants to engage with the process rather than simply serve as sources of data. For example, trauma-informed research design is reflexive in that it acknowledges how the researcher and the study itself can potentially cause harm to the participant during and after data collection (Hardner and Wolf, this issue). Feminist analysis recognises gendered differences in the study setting, targets feminist lines of inquiry and allows participants to influence the research design itself, for instance in fundraising (Dale and Breeze, this issue), with employees of non-profit organisations (Hardner and Wolf, this issue), within school-based volunteer programmes (Lau, this issue) and in third sector-government partnerships (Sanders, this issue). Critical researchers aim for the structure of the relationship between the researcher and the researched to be that of shared power or collectivist in nature. Ethnographic tools prove valuable in this space. Extended time and repeated interactions with the setting and a close, small group of individuals offer greater opportunity to build 'thicker' descriptive data and provide greater depth to interpretations of behaviours and societal understandings.

In this collection of articles, the unit of analysis ranges from individuals, to groups, to organisations. Individuals in these studies were identified as girls, women, indigenous people, non-profit leaders, the elite and volunteers. The interpretation of the data collected from individuals is used to make sense of the non-profit sector at the micro (individual), meso (organisation) and macro (sector) levels. Qualitative analysis allows for movement between units and levels of analyses by capturing the interdependencies of institutional influences of the organisation on individual behaviour and the interrelationship between societal expectations of individual behaviour and the resulting organisational behaviour. These interrelationships are central to critical analyses of non-profit organisations and make way for structuralist interpretations. In this special issue, such structures are empirically examined through feminist, critical race, decolonial and neoliberal marketisation theories.

The contents of this special issue

This special issue starts with Elizabeth Dale and Beth Breeze's (2021) article exploring the gender stereotyping, discrimination and harassment that occurs in the profession of fundraising. The authors apply a feminist analysis exploring the role of power among individuals within gendered spaces. This feminist approach to research avoids asymmetrical relationships between the researcher and the researched. Dale and Breeze examine 366 examples of gendered stereotyping pulled from survey data in addition to data from three focus groups. Through the counter-storytelling of gendered stereotyping experienced as fundraisers, the authors capture the experiences in this gendered space that challenge a view that women are not interested in leadership roles. Dale and Breeze also argue that the fundraising field is gendered, which undermines one's professional trajectory.

Kimberly Hardner and Molly Wolf (2021) also take a feminist approach in their exploration of a non-profit organisation that was seeking to implement a 'trauma-informed care' approach to their work. Trauma-informed care recognises that individuals may have experienced trauma in the past, and seeks to embed everyday practices that work to ensure that no one in the organisation is retraumatized, allowing opportunities for healing through collective notions of safety, trustworthiness/transparency, peer support, collaboration and empowerment. By employing feminist approaches to research methods that prioritise participants' voices and take the utmost care to diminish power inequalities between the researcher and the researched, Hardner and Wolf show how the feminist methodology not only encouraged the use of trauma-informed care in the organisation, but also taught the organisation ways of being trauma-informed that were previously unidentified, demonstrating how critical approaches can translate into action, and researchers can work as collaborators focused on improving their research sites, not just collecting data.

Amy Sanders (2022) applies a feminist institutionalist lens in her examination of representation and participation in Welsh third sector-government partnerships. The feminist institutionalist lens frames equalities by how institutions formally and informally frame or constrain them. Sanders applied a critical discourse analysis to semi-structured interviews with policy elites. Critical discourse analysis allowed her to question expectations driven by institutions. She found that equalities representation is restricted to institutional expectations for the third sector as a whole, undermining the legitimacy of expert knowledge on inequalities to inform policy making. Ultimately, the expectation of a third-sector unified voice risks driving out diverse voices. A feminist institutionalist perspective was engaged to identify sources of discrimination and injustice.

In their exploration of how neoliberal marketisation is altering the nature of non-profit work, Billie Sandberg, Robbie Waters Robichau and Andrew Russo (2021) also explore the gendered way in which social structures impact non-profit managers. Across their sample of interviews, they find that female managers wrestle more with the conflicting discourses of market and mission values and rhetoric, as well as having to deal with sociocultural expectations around gender. Their article provides us with a framework for understanding the relationship between neoliberalism, marketisation and the ways in which the modern non-profit work environment is structured, showing how neoliberal approaches emphasise developing the ideal (female) entrepreneurial subject, one who is committed to a narrative of overwork as an aspect of their core identity, and where a healthy work-life balance is almost seen as something with negative implications.

In her article, Emily Lau (2022) documents the experience of a group of girls at an English school, and the ways in which coerced volunteering can be imposed through gendered constructs. Using a feminist ethnography including observations, interviews and case studies within the school setting, Lau applies Blackman's concept of 'crossing borders' to engage in constant reflexive work on her role as researcher and the students' roles as the researched. The triangulation of continual observations and interviews with both teachers and students provided a broader picture of the way volunteering expectations were imposed on the female pupils. She found that school-based volunteering systematically reproduced societal gendered inequalities and pushes for collective understanding of how inequalities operate among everyday social expectations.

In her article, Katherine Chen (2021) undertakes an organisational ethnography of a micro-school in New York. Making use of Yang's concept of 'scyborgs' – agents who repurpose colonial practices for decolonised, transformative goals – her article showcases interlinked stories that draw on ethnographic research on a liberatory organisation, and Chen's own efforts to practise what she learnt from these sites in other contexts, including her workplace, her child's school and a voluntary association. Chen also makes use of vivid first-person autoethnographic accounts, as she details how her research and experiences intersect with her own personal and professional life. This critical approach to writing challenges much of the hegemonic standards in non-profit studies and provokes the need for wider reflection on the role of reflexivity and positionality within the research process.

Finally, in their article, Antonio Jimenez-Luque and Melissa Burgess (2021) engage decolonial theory to examine how the implementation of non-profit agendas can mirror colonialism. When decisions about mission and programming are made by elites not representative of the people the organisations serve, they can be misguided and harmful. Non-profits then replicate social hierarchies based on race and class resulting from colonial times. Jimenez-Luque and Burgess conducted an ethnographic case study of a Native American non-profit in the north-west of the US, using a dataset of observations, artefacts and interviews with non-profit leaders and participants. The authors used a 'research with' approach, with decolonising and Indigenous research methodologies. Jimenez-Luque and Burgess find that emotions and emotion regulation can be used to change the dominant script and then to resist, raise voices and contribute to social change.

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Conflict of interest statement

The authors declare that there is no conflict of interest.

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