

Article

Towards a Critical Occupational Approach to Research

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Abstract

Critical approaches to research are becoming increasingly more prevalent but occupational science and critical approaches have not been explicitly combined into one approach despite the potential to enrich the understanding of the assumptions and ideologies underlying human activity. In this article we outline an approach to research that is mutually informed by occupational and critical social science perspectives. The critical occupational approach we describe can be used to explore the ways in which knowledge is produced through engagement in occupation, who controls knowledge production, the mechanisms of how occupations are taken up, and who stands to gain or lose. We discuss the implications and considerations for generating research purposes and methods and conducting analyses. We then illustrate the use of the approach through a case study. We conclude this article with consideration of the wider uses and implications of a critical occupational approach within health and social research.

Keywords: critical social science, occupation, qualitative methodology

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In this article we describe a critical occupational approach to research. This approach draws on the fields of critical social science and occupational science in order to locate occupation as a site of knowledge production, that is, active political sites where meanings are generated and contested. This article draws on our experience of using this critical occupational approach in a recent qualitative study to explore how knowledge is produced and reproduced when people engage in occupations. First, we provide a description of occupational and critical social science perspectives and how these perspectives are combined to develop a critical occupational approach. We then use a case study to illustrate various components of the approach and explain the approach in practical terms. We conclude with a discussion about the wider implications of a critical occupational approach for studies that examine occupational engagement.

What is an Occupational Perspective?

An occupational perspective is defined as “a way of looking at or thinking about patterns of doing” (Njelesani, Tang, Jonsson, & Polatajko, 2012, p. 1). In this definition, ‘doing’ in the phrase “patterns of doing” is synonymous with the word occupation and reflects the idea of doing or engaging in activities. The term *occupation* refers to activities that are named, organized, and given value and meaning by individuals and a culture (CAOT, 1997). Occupations include every activity in which a person participates over the course of a day, week, month, year, or life (e.g., personal care, childcare, work, school, household maintenance, and leisure activities). An occupational perspective assumes people’s doings have purpose and meaning from the micro-level (individual) to the macro-level (society at large), and these doings must be considered in relation to the context in which they are situated.

Research that uses an occupational perspective is conducted to generate knowledge about the form, function, and meaning of human occupations (Yerxa et al., 1989). This perspective assumes that occupations have many forms, functions, and meanings. Accordingly, occupations could be seen as health and wellness promoting or harmful. An occupational perspective is unique because the unit of analysis is occupation, and the research that uses this perspective focuses on how specific occupations are described and understood. An occupational perspective has been used to study the settlement process of Indian immigrant women settling in New Zealand (Nayar, Hocking, & Giddings, 2012), work integration for people with brain injuries, mental illness, and intellectual disabilities (Kirsh et al., 2009), and occupational transitions to retirement (Jonsson, Josephsson, & Kielhofner, 2001).

The study of occupation has generally been conducted in the fields of occupational therapy and occupational science; however, a broad range of disciplines study people’s everyday occupations. The disciplines of health science, business, economics, sociology, psychology, criminology, geography, and journalism have all examined the occupational nature of human beings and the impact of occupation. For example, in a review of the sport sociology literature, the benefits of participation in sporting activities for young people enrolled in sport-for-development and peace programs were examined (SDP IWG, 2007). It was found that in addition to the obvious impact on physical fitness participants also described the social benefits of sports and benefits as a result of the context in which the sports occurred. These physical and social benefits of participation in sporting activities, including those related to the context, are consistent with the multidimensional (i.e., dimensions of the person, occupation, and environment) nature of occupation (Yerxa et al., 1989).

An occupational perspective helps us understand which occupations are selected, who is engaged in these occupations, and the context of these occupations. It does not, however, address why certain occupations persist, whose interests they serve, and the assumptions that underpin their

ongoing acceptance. In addition, an occupational perspective is not well suited for examining the social, economic, and political forces within which occupations are situated and by which they are shaped. Lessons for addressing these areas of inquiry may be drawn from a critical social science perspective.

What is a Critical Social Science Perspective?

Critical social science is a term that applies to a vast field of theory and research that deals with social transformation, equity, and social justice (Guba & Lincoln, 2005). A critical social science perspective involves reflexive questions that can be used to address the implicit assumptions and ideologies underlying social conditions. Critical perspectives examine the role of power, the presence of contradictions, and the dialectical relationship between theory and practice (Eakin, Robertson, Poland, Coburn, & Edwards, 1996). For Kincheloe and McLaren (2005), a critical social science perspective views knowledge as socially situated and power and knowledge as inextricably linked. This approach assumes certain groups in society (e.g., groups formed in relation to class, race, gender, ability, etc.) are more privileged than other groups.

Researchers who use a critical social science perspective may be viewed as scholars searching for new and interconnected ways of understanding how power and oppression shape everyday human experiences. Critical social science researchers “are never satisfied with merely increasing knowledge” (Kincheloe & McLaren, 2005, p. 305); rather, in order to confront injustices in society they also attempt to expose the contradictions in society accepted by the dominant culture as natural. According to Kincheloe and McLaren (2005), a critical social science perspective is appropriate for researchers who use their work as a form of social or cultural criticism. It enables researchers to question why particular social structures exist, what keeps them in place, and whose interests they serve.

The use of a critical social science perspective in qualitative research has grown over the past 20 years. For example, in the field of physical therapy, Gibson and Teachman (2012) used this perspective to examine how the dominant social assumptions about the value of walking are reflected in rehabilitation practices and what the effect of these assumptions are on parents and children. In the fields of education and sociology, Berman and Tyyska (2011) used this perspective to examine the ownership of language translated by interpreters in a research project that examined immigrant women’s English acquisition. In one additional example, Conrad’s (2004) use of a critical social science perspective to examine at-risk youth’s perceptions of their engagement in risky behaviors uncovered a counter-narrative to the taken-for-granted concepts of at-risk and deviance. A critical social science perspective has also been used in the field of occupational science, as will be discussed in the next section.

How Occupation Research has used a Critical Social Science Perspective

Studies of occupation have increasingly incorporated concepts from a critical social science perspective (Stadnyk, 2011). For example, Laliberte Rudman and Molke (2008) examined how *productive aging*, defined as “encouraging older inactive adults to move back into the workforce” (p. 379), is presented in the media and how these presentations influence the activities that older adults see as possible and ideal. Beagan and D’Sylva (2011) investigated the occupational meaning of food preparation and the power women attain by preparing a highly significant symbol of their culture. Townsend and Wilcock’s (2004) work on *occupational justice*, a field of study that examines occupational needs, strengths, and potentials of individuals and groups, while taking into account occupational enablement, empowerment, rights, and fairness (Stadnyk, 2007), used a critical social science perspective to examine the socio-cultural processes that inhibit

people from participating in activities. Park Lala and Kinsella (2011) examined the underlying assumptions of phenomenology and found that critical features of the phenomenological tradition could be used to offer a critique of normative perspectives, master narratives, and dominant discourses about human occupation.

In their recent book, Whiteford and Hocking (2012) promote the idea of using critical social science perspectives in occupational research. Although the book is in part focused on conducting critical research, no description is provided of an approach to research that could be used to understand how knowledge is produced and reproduced through engagement in occupations. The text thus leaves readers excited about the possibilities of critical occupational research but unsure about how to proceed.

Although there are some studies that use both occupational and critical social science perspectives, there is little information about how these combined perspectives can ground and guide research or the specific methodologies for conducting research that incorporates both these perspectives. To help address these gaps, we propose a critical occupational approach as a way to proceed with research that seeks to understand the assumptions and ideologies underlying human activity and how knowledge is produced and reproduced through engagement in occupations. In the following sections we first describe a critical occupational approach and then use a case study of sport-for-development programs in Zambia to illustrate the approach.

Introducing a Critical Occupational Approach

A critical occupational approach considers occupation to be a site of knowledge production rather than the object of inquiry. An object of inquiry is typically considered a static phenomenon that is assigned meaning rather than an active political site where meaning is generated and contested. This idea is based on the assumption that knowledge production differs from the meaning making described in traditional phenomenology and other more interpretive qualitative traditions (Crotty, 1998). From a critical occupational perspective, knowledge production involves the social reproduction of knowledge in relation to the political and social contexts of an occupation, whereas meaning making involves understanding people's personal subjective experiences when they engage in an occupation. Many studies (e.g., Devine & Nolan, 2007; Hon, Sun, Suto, & Forwell, 2011; Njelesani, Sedgwick, Davis, & Polatajko, 2011) have largely considered occupation to be part of a broader research inquiry rather than a site of knowledge production. Understanding knowledge production involves an exploration of what knowledge is produced, how it is produced, the context in which it is produced, the way it is organized, and the systems that control what is produced (Gibbons, 1994). In this context, knowledge generation is neither a simple nor a neutral process; rather, it is complex and contextually bound (Kinsella & Whiteford, 2009). In other words, knowledge generation is politically active.

Recognizing occupation as a site of knowledge production acknowledges that the meanings associated with an occupation are transient and depend on context. These meanings are constantly being reproduced among social actors, and they are also evolving in reaction to changes in social context. In addition, these meanings have co-constituting relationships with context because changes in the meaning of occupation also affect the socio-political environment. Research that uses a critical occupational approach may seek to understand

- who controls knowledge production and the mechanisms involved in choosing an occupation;
- what knowledge is produced when engaging in an occupation;
- where an occupation is situated and, as a result, where knowledge is produced;

- when an occupation is produced and, as a result, when knowledge is produced; and
- how this knowledge is reproduced.

Applying a Critical Occupational Approach to Research

Identifying the Research Purpose

Once occupation is recognized as a site of knowledge production, researchers are able to problematize occupations, which are no longer seen as neutral. For example, research using a critical occupational approach could explore the meanings associated with occupations that are taken for granted by individuals and how these might contribute to marginalization, dominance, or oppression. Another research study could include exploring how prevailing socio-cultural norms and values may shape occupational choices and preferences.

Considerations for Data Generation

Choosing methods for a critical occupational approach is not substantially different from the process used for any other study. Whether to use quantitative or qualitative research methods is based on the nature, aims, and goals of the research. We anticipate, however, that many of the research questions developed using a critical occupational approach may lend themselves to qualitative methods. The form and format of the methods, including interviews, focus groups, observations, document review, and memo writing, will vary according to the goals of the study. For example, interviews might be used as a way of examining participants' assumptions, beliefs, and values in relation to the occupation being studied. Because interviews are also considered collaborative dialogues between the researcher and the participant that have inherent power relations, they might be considered as sites of knowledge production in and of themselves. While interviews can provide a rich understanding of how participants reproduce or contest knowledge, participant observation might be used to provide critical information regarding participants' interactions in the context of the occupation. Participant observation can produce important different information than an interview because observation does not rely on information described to researchers by participants about their practices in relation to context as is done during an interview. In addition to producing different information, observational data can fill in the gaps of information that are missed or misunderstood when conducting interviews because it provides an opportunity to gain an understanding of the practices that participants are unwilling or unable to talk about.

Considerations for Data Analysis

A critical occupational approach to analysis goes beyond describing participants' experiences or perspectives as is more common in other traditions (Sandelowski, 2000). A critical occupational approach serves to identify dominant ideologies surrounding an occupation and reveal the social structures and assumptions that may not be recognized by participants. A critical occupational approach acknowledges that participants may be largely unreflective of the social structures and assumptions that affect their beliefs and engagement in occupations. The unpacking of these social structures and assumptions distinguishes this analysis from the aims of other qualitative research methods.

In order to identify the dominant ideologies surrounding an occupation and illuminate the assumptions and social structures that may not be recognized by researchers or participants, researchers, in a critical occupational approach, must attempt to make taken-for-granted assumptions explicit. When critical occupational researchers make assumptions explicit,

contradictions among assumptions can be identified (e.g., participants say one thing and do another or use “double standards”). Once implicit assumptions are made explicit, analysis can work to identify the overarching dominant beliefs and social structures that underpin these assumptions. Then, an examination can be made of how various ideologies and structures may influence knowledge re/production in relation to the political and social context of an occupation. Furthermore, theorizing in a critical occupational approach requires shedding light on macro-sociological concerns about power, social position (in relation to gender, class, ethnicity, etc.), and social structure as they relate to occupation.

Asking critical occupational questions of the data (as opposed to the participants) is one technique that can be used to analyze data generated in studies that use a critical occupational approach. This technique includes asking questions about how knowledge might be produced when engaging in occupations and how discourses, hegemonic practices, and power relations influence the choice of occupations. Some examples of critical occupational questions that a researcher might ask of his or her data include:

- What are the relevant socio-cultural structures and processes that may mediate and constrain participants’ perspectives?
- Which occupations are seen as being preferable? How are they discussed or represented in the data (e.g., talk, text, images, etc.)?
- What appears to be understood as the preferred way to engage in occupations?
- What assumptions underpin the ongoing valorization of some occupations and the rejection of others?
- What power relations are at play?
- Whose interests do the occupations serve?
- Who is privileged as participants in the occupations?

Memo writing (Birks, Chapman, & Francis, 2008) is also recommended when analyzing data generated in critical occupational studies. Writing reflexive memos involves thinking critically about what you have done and why, challenging your own assumptions, and recognizing the extent to which your thoughts shape what you see. Analytical memos serve to assist the researcher in making conceptual leaps from raw data to those abstractions that explain research phenomena in the context in which they are examined. Thus, memo writing is a question-raising, puzzle-piecing, connection-making, problem-solving, answer-generating tool. Similar to the technique’s benefits in other qualitative methods, memo writing enables researchers to write and think about how the emerging results shed light on the influence of power, social class, and social structure on an occupation.

Considerations for Presenting Results

When a critical occupational approach is used, the results must be congruent with an occupational perspective and be critical in nature. The results should illuminate how occupations are understood in a social context. It is this richer understanding of the assumptions and ideologies that underlie human activity in a social context that makes the results of a critical occupational approach unique from results generated by other approaches.

Applying a Critical Occupational Approach to a Sport-for-Development Case Study

Having described the conceptual basis for a critical occupational approach and considerations for its application in research, we now use a case study to demonstrate how these concepts were

operationalized in our own research. For further details of the study see Njelesani, Cameron, Gibson, Nixon, and Polatajko (2012).

Research Purpose in our Case Study

The purpose of our case study was to examine how sport-for-development ideologies and practices in Lusaka, Zambia influenced the participation of youth. Given this purpose, participation in sport-for-development activities was viewed as the site of knowledge re/production. A critical occupational approach was appropriate to guide the research because the study was designed to go beyond program evaluation and examine the ongoing acceptance of, or resistance to, activities used in sport-for-development programs. Sport-for-development programs were the focus of this research because over the past 15 years there has been a proliferation of new international development initiatives focused on sport occupations, but to date the research has not included an analysis of sport-for-development from a critical occupational approach. This is a conspicuous shortcoming given that sport-for-development initiatives use sport occupations as their primary method of program delivery. Zambia was chosen as the context for the study because it has been at the forefront of efforts to use sport as a tool for development (Lindsey & Banda, 2011). The study was granted ethical approval by the University of Toronto and the University of Zambia.

Data Generation in our Case Study

To generate data in our study, we conducted key informant interviews with 27 staff and youth participants in sport-for-development organizations. The interview questions helped guide an in-depth exploration of participants' engagement in sporting occupations in relation to context, the knowledge produced through this occupational engagement, and how this knowledge might affect participants' opportunities to engage in occupations. Examples from interview guide:

- Are there guiding principles that influence your choice of activities to be used?
- What are the local customs and traditions that influence your choice of program activities?
- Have program youth voiced any requests to you for changes in your program activities?
- To what extent does the age, race, class, gender, sexuality, or ability (social categories) of program youth enable or prevent you from carrying out program activities?

The interviews were conducted in English by the first author and a local research assistant. Fluency in English was not perceived to be a barrier to communication because all of the participants spoke English, with English being the national language of Zambia and the medium of instruction in schools. Nevertheless, during some of the interviews it became clear that the participants and researchers did not understand one another. Because a research assistant was always present, he was able to take over asking the questions, conducting the interview in English or a local language as needed. This choice that participants had to engage in the interview with whom they felt most comfortable helped to manage asymmetrical power relations between participants and researchers.

In addition to interviews, we conducted observations of people's interactions with their environments. From a critical occupational approach, participant observation enabled us to gain a better understanding of how the occupations were used in the setting (e.g., how religiously

significant activities started the day's programming), who was participating and not participating in the occupations (e.g., who was invited but unable to participate because they lacked sporting attire), what social behaviors were exhibited among staff and youth (e.g., who was selected to play on the teams during competitive games), and who held authority, initiated and lead activities, enforced discipline, and made final decisions (e.g., who determined which age/level of boys' teams played against older girls' teams). Data consisted of observational field notes and the interview transcripts.

Data Analysis in our Case Study

In this study, we used multiple analytical techniques drawn from the qualitative data analysis approach described by Miles and Huberman (1994), the multiple case study analysis approach described by Stake (1995), and the coding methods described by Saldana (2009). The techniques used to analyze the data collected in our study included: (a) a priori and inductive coding; (b) pattern coding, which involved grouping similar codes together based on their commonalities and identifying emerging themes (Miles & Huberman, 1994); (c) constructing diagrams (Clarke, 2005) and tables; and (d) memo writing (Birks, Chapman, & Francis, 2008).

The coding approach involved generating and assigning a priori and inductive codes. We created a priori codes based on our research objectives, our occupational and critical perspectives, and the reviewed literature. One of our initial a priori codes involved taking from the literature the dominant and largely unchallenged idea that sports can be a moral compass for children (Delaney & Madigan, 2009). This idea is based on the assumption that when children participate in sports they are not engaging in harmful activities. In the case of Zambia, which is a Christian nation, harmful activities are often linked to being in opposition to Christian values, and this context led us to the development of the a priori code, Save the Children from Evil. Instances of participants talking about the ability of sports to correct what was viewed as wrong or not consistent with Christian values included: "The girls were living a reckless life, but after we introduced the program, now they are living a good life" (Paul, staff). The idea of how sport was seen to lead to engaging in behaviors that are valued in Zambian society was also noted by participants: "I keep myself busy than doing things that are harmful" (Pamela, participant).

We also asked critical occupational questions similar to those listed above in order to narrow our focus during data analysis. This process led to the generation of codes such as Occupations Reinforcing Stereotypes, which revealed stereotypes about how girls should behave in society: "The organization empowers girls in sports to avoid bad activities: sexual immoralities, beer drinking, prostitution, early marriages. So avoiding girls from engaging themselves in activities which are not fit for their bodies. By not staying at home we avoid those things. It is better we spend our time at the ground" (Trina, youth participant). Throughout the coding process, we engaged in the process of writing reflexive and analytical memos. Memo writing strengthened our analysis by helping us dive further into the data and create stronger ties between the data and our critical occupational approach.

We aimed for results that went beyond description and revealed more than a set of nouns that contains only surface, descriptive patterns, and thus, we used the "touch test" (Saldana, 2009). This strategy helped us progress from the particular to the general and involved examining the results and asking the following question: "Can I touch what they represent?" If the answer was "yes," then more interpretation was required because the findings had not yet been interpreted beyond the level of description. For example, one preliminary category that we developed was Male-Only Sports, but this theme failed the touch test because it was too concrete and only contained a description of sports. We then engaged in deeper interpretation and used the concept

of *social differentiation* to generate the higher-level theme of All for the Boys. Social differentiation is defined as “the process by which the different roles and functions of the members of a society become institutionalized” (*Oxford English Dictionary*, 2013). The theme, All for the Boys, passed the touch test because it contains abstract concepts that helped us understand how focusing on sporting occupations may lead to unintended consequences. Together, all of the analytical techniques helped us think about the data more theoretically and pushed us to move from specific codes to themes that are grounded in a critical occupational approach.

Results of our Case Study

Having described the techniques used to analyze the data collected in our study, we now present an excerpt of the results from our study to demonstrate how the results are congruent with an occupational perspective and are critical in nature. The results of our analysis revealed that participants reproduced dominant beliefs and assumptions about the interactions among physical contexts (e.g., space is allocated by the government for youth to play sports), cultural contexts (e.g., ideas about appropriate sports to be played in a Christian nation), social contexts (e.g., appropriate sports for girls), historical contexts (e.g., how sporting occupations were introduced into Zambian society), and political contexts (e.g., priority of funding for sporting occupations). The assumptions held by participants suggested that many took for granted that sports are appropriate activities to use in youth programs: “Because youths love sport on any given day, a weekend or a working day, youths love sport [football]” (David, staff). “Even if a Zambian is playing football at the international level, everyone believes that they should have the experience of playing football as a child” (Paul, staff). In these examples, staff participants reproduced dominant beliefs and assumptions about sports and the benefits of sporting activities: (a) every child loves sports, (b) no harm could ever come to any child who plays sports, and (c) sports do not have negative consequences.

A key theme we identified was titled, It’s About Winning. In this theme we illuminate how programs were seen as a success when boys reached the goal of playing football (known as soccer in North America) as paid professional athletes. Underlying this theme is the dominant ideology that defines able-bodied boys in opposition to girls and others; that is, able-bodied males who can win the game should engage in sports, and girls or youths with disabilities should be spectators. This theme incorporates an occupation (football) and critical concepts of justice and the masculine ideology of competition. For example, a staff member stated, “If these boys work hard using sports they are able to feed their families because they create a career as a result of that” (Mwamba, female, staff). This understanding of winning as a central goal of the activity was pervasive in the interviews and took precedence over other program aims, such as increased HIV awareness or girl youth empowerment. Therefore, the key theme, It’s About Winning, captured the value assigned to winning in the context of the program and reflects larger, ingrained social values that valorize and privilege the male role of breadwinner, which contrasts with the formal official goals of the program.

Our results illuminate how dominant ideologies within the sport-for-development movement in Lusaka, Zambia may create inequalities and limit the opportunities of some youth to participate in the organizations’ activities. It is this richer understanding of the assumptions (i.e., sports do not have negative consequences) and ideologies (i.e., sport is a masculine and non-disabled domain) that underlie human activity (i.e., participation in sporting occupations) in a social context (i.e., sport-for-development programs in Lusaka, Zambia) that makes the results of our study—using a critical occupational approach to research—unique from results generated by other approaches.

Discussion

In this article, we have drawn on our experience to provide an illustrative example of conducting research using a critical occupational approach. This article is not meant to be a standalone guide for using a critical occupational approach to research but to help illuminate and apply literature that discusses occupational and critical social science theories and methods.

The central focus of critical occupation studies has been the meso-societal influences that affect occupations; however, few studies have examined macro-level societal influences, which is useful for a critical occupational approach (Laliberte-Rudman, 2012). According to Dickie, Cutchin, and Humphry (2006), an individualistic perspective has been over-emphasized in occupational science and other health and social disciplines. Wilcock and Hocking (2004) also identify the need for more population-level studies that examine occupations because these types of studies would produce results that cannot be achieved using a more individual and reductionist approach to the study of occupation. A critical occupational approach is one method that could be used for these types of studies because it goes beyond an investigation and interpretation of individual experience.

A critical occupational approach provides occupational science researchers a description of how to proceed with research that seeks to understand how knowledge may be re/produced through the organization of engagement in occupations. Beyond the discipline of occupational science, the approach could help researchers in other disciplines critically reflect on and expand their ways of thinking about an occupational phenomenon. For use in other disciplines, the critical occupational approach can be modified to suit the construct in question and the researcher's discipline. One challenge of the approach for researchers from outside the occupational therapy or occupational science disciplines is that the concept of occupation may not be familiar to them; thus, they may choose to use concepts that are more familiar in their own disciplines. There is, however, a benefit to using a definition of occupation that has been debated and established in the occupational science literature, and researchers from other disciplines should ensure that their concept of occupation is related to human doings in order for their study to be congruent with a critical occupational approach. Finally, a critical occupational approach is valuable generally because it enables researchers to weave critical social theory into empirical research. In order to enable researchers from occupational science and other disciplines to make a judgment about the quality and transferability of the approach for their own research, future research that uses the critical occupational approach is needed to provide researchers with greater practical examples of this approach.

Conclusion

A critical occupational approach has the potential to provide important insight into how knowledge is re/produced when engaging in occupations, who controls knowledge production, the social dimensions of engaging in occupations, how an occupation is chosen, and the social, cultural, and political contexts of occupations. Although this approach is suited to research in occupational therapy or occupational science, a critical occupational approach could be used to obtain macro-level information about occupations in other areas of health and social research.

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