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Methodological reflection in research

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Imagine a very common scene: a park at noon, teeming with trees and all shades of green, and at its center a small pond where a few birds and other creatures are swimming. Across from it, placed as if it were the most self-evident thing in the world, a park bench waits for someone who is naturally inclined to contemplate the body of water to sit on it. It seems so natural, so far from anything unusual that it should be so, that no one wonders why and for what purpose everything is set in place thus or how, instead of sitting there and watching the pond, anyone would turn their back on it and scrutinize the bench and what goes on beyond it.

Something similar happens with disciplines and disciplinary fields: a cognitive bias within those who inhabit these realms leads us to interpret our disciplines or disciplinary fields as positions from which we can observe, in this case, phenomena and objects of knowledge, seldom viewing such positions as objects of knowledge in themselves.

Thus, the most common position of those who watch from the comfort of their discipline is to assume that what they observe is always something alien, taking for granted that the bench has always been there, ready to seat comfortably anyone who wishes to observe what takes place in the background.

The properties, eventualities and accidents of these benches such as how they got there, who brought them, what they are made of, or even how comfortable they are to sit on and watch a pond, are a secondary concern, almost an accessory, which escapes the strangeness that affects, very clearly this time, what is observed from them.

Although this possibility of reflecting upon the bench rather than about the pond is a very uncommon occurrence, it does happen, and surely every discipline and disciplinary field has, albeit with different intensity and shape, experienced this type of event sometime throughout their history, leading to what we call self-reflectiveness. This is also the case of the disciplinary field of education.

Thus, self-reflectiveness may point to very particular dimensions such as the axiological, the ethical, the deontological, and, to a lesser extent, the ontological and the pragmatic ones.

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While in the former three our concern is to identify the catalog of values at hand – in this case, a disciplinary field – the latter two seek to identify the sets of rules and assumptions through which a field legitimizes itself, sets itself apart from others, and how the field is organized, as well as how such rules are materialized in the production of descriptions and explanations and how the methods, techniques and knowledge production designs it has adjudicated itself operate throughout.

At present, even though in the field of education the former three dimensions have been repeatedly reviewed as thoroughly as those of original social science disciplines such as anthropology or sociology (Sirvent, 2010), self-reflective reviews on the practical ways to generate knowledge on education, what we would call “methodological traditions”, are far scarcer, especially in Latin America.

This, we believe, is due in part to two major factors: 1) the foundational methodological tenets in education, both in the phenomenological and the experimental tradition, have proven to have such a regular and sustained empirical solvency and, therefore, a nearly automatic identification between method and object, that for a long time it was not deemed necessary to rethink or renew in any depth their historic empirical instruments and, 2) because the object of study and problematization of the field of education had not experienced, until relatively recently, an identity crisis such as those that have taken place in other social fields and disciplines.

In the late twentieth and early twenty-first centuries, different kinds of element arose which have led us to question our methodologies. The emergence of the internet and the access to other ways to produce knowledge, changes in citizenship and social movements, feminist and decolonial approaches and, in the last three years, the COVID-19 pandemic, have led us suddenly and without any possible delay to conduct an urgent review of our methodological arsenal, to acknowledge old and new epistemological dilemmas, and to undertake a peremptory examination of our operating practices of production of knowledge. This exercise has had a productive start, leading to crossbreeding and hybridization in the methodological-disciplinary “border porosity”, and the appearance of innovations and exporting of original tools.

Methodological decisions and the researcher’s positioning

A few decades ago, Gilberto Fregoso Peralta (1994: 19) pointed to an absence of discussion on methodology:

There are facets of our everyday research work that are almost never made public by those of us who undertake the task of extracting from reality some aspects with the overt aim of systematize and understand them better. It would almost always seem more important to communicate the results of our inquiries as a product, rather than dwell on the process that led us to make some findings (when these exist).

Although any scientific publication worthy of that name features a methodological section that accounts for the methodologies, methods or techniques and instruments through which the data were collected or produced, in many cases this is limited to mentioning them, without any justification of the decisions made to use them or any reflection upon them. This is not a complaint – we have all done it at some point in our career – but it would be worthwhile to stop and place methodological concerns as a priority.

A short time ago the authors of this text spoke with our colleague Fernando Cornejo about how our interest in methodology was born, and all three of us agreed that it stemmed from the absences we encountered in our training as researchers. Both classes and manuals on methodology usually offer more or less general orientations, and it is our responsibility to translate such abstractions into concrete elements that later allow us to *do* things.

Thus, we believe it is necessary to maintain a permanent discussion on methodology. We agree with Hammersley (2011) that methodological reflection is essential in the practice of research. We must remember that scientific research is a practice, and that as such it is reproduced and also transformed by the actors who carry it out.

In this sense, we focus our reflection on methodological decisions, in which there are three key moments: when we plan our research, when we conduct it, and when we publish its results.

The first moment is when we design our research and we must make decisions on the methodological approach that will orient our work, and on the techniques with which we will make it operable. All too often we hear – and we even say – that something “was used” or “chosen”, and that conjures up the image of a supermarket in which there are different boxes with techniques ready to be used: an instrument design by this person was applied, digital ethnography was used, a discussion group was chosen. However, we must ask ourselves if such methodological decisions are coherent with the question and objectives of our research, if they are viable in the context in which we are working, and even why we incline ourselves for certain choices instead of others.

The second moment, when we conduct our research, happens mainly if that which we designed is not working as we expected in practical terms: the people did not respond to our survey, some of them did not speak enough in the discussion group, the university authorized two weeks of field work for something that might well take four months. In these cases we must make decisions, and do it quickly. This is often more difficult for researchers in training and a little more manageable for researchers who have spent more time in the field, but even for the latter these decisions imply considering several possible aspects and scenarios.

The third moment is when we present or publish the results of our research. It often happens that a reviewer of an article before publication asks why certain techniques were used instead of others. This leads us to justify – sometimes *a posteriori* – the decisions made, and to accept our responsibility for the scope and limitations they imply.

This reflection upon our decisions involves thinking about our own position as researchers vis-a-vis what we research on, the people with whom we do it – and there is a broad spectrum between study subjects and participants in the research – and the social and academic context in which we move (Anderson *et al.*, 2010; Berger, 2015).

As we can see, the different methodological moments are, in principle, epistemological moments insofar as they are the product of decisions and positions on how we know what we know. In education, as in any other discipline or disciplinary field in the social sciences, self-reflectiveness takes part in shaping its future and its course. New methods, techniques, and the design of methodological routes itself, depend on our capacity to look around ourselves. In doing so, the park bench from which we watch or participate is not an innocuous choice.

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