TRACING CONTEXT AS RELATIONAL, DISCURSIVE ACCOMPLISHMENT: ANALYTICAL LESSONS FROM A SHADOWING-BASED STUDY OF HEALTHCARE CHIEF EXECUTIVES

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ABSTRACT

In this chapter, we problematize traditional approaches to understanding context as an analytical category, and instead suggest engaging it differently, as members' concern continually made present through particular kinds of attention and action. We elaborate this via illustrative empirical exemplars from our shadowing-based study of chief executives in the English National Health Service. These demonstrate the ways in which context was actively made to matter, by CEOs making connections and giving particular meaning in district work situations. Building on these, we offer a number of analytical and methodological contributions, and outline implications, including for literatures on managerial work, power, and relational prospective sensemaking.

KEYWORDS

Context, executive work, relations, discourse, shadowing

INTRODUCTION

'Context' is used to refer to the things "we need to know […] to properly understand an event, action or discourse" (van Dijk 1997, 11). When we use the term, we implicitly operate a logical distinction between a focal 'it', and its background. The idea of context is mobilised when there is an assumption or a belief that the focal phenomenon cannot be understood or represented unless one reaches beyond the phenomenon itself, and takes into consideration its circumstances. While the idea that social and human matters have 'circumstances' is widely (albeit not universally) accepted in the social and human sciences, how one should conceive of the relationship between the phenomenon and context, and so what counts as context itself, is much more contentious.

A major distinction exists between those who see context as causally influencing a phenomenon, and those who take a more interactive view. The first perspective is common, and probably predominant in healthcare management. Here context is often operationalised in terms of a set of variables that 'affect' or 'impact' the phenomenon. For example, supporters of the behavioural model of healthcare utilization (Andersen, 1968) call environmental and provider-related factors that influence utilization "contextual variables", because "they measure the context or milieu in which utilization occurs" (Phillips et al. 1998, 573). Such environmental factors include the delivery system, external environment, and community. This also illustrates how, in this approach, context is often engaged as a residual category. It is used to capture the 'noise' in the model, the "etcetera" that future research will have to untangle. This view is echoed in management studies more generally. For example, Mintzberg (2009) distinguishes between external context (culture, sector, industry), organizational context (form of organisation, age, stage, and size), job context, situational context, and personal context. These come together to contribute to a particular "posture" taken by certain chief executives. This leads him to suggest that "the effective manager may more usually be the one whose natural style fits the context, rather than one who changes style to fit context, or context to fit style" (*ibid*: 132).

In the last few decades, an increasing number of scholars have rejected this static and externalist view of context. They have instead promoted an alternative: internalist, interactive and dynamic. Rejecting the idea that context is simply the passive 'out there' container of action (the "soup and bowl" idea of context), these authors consider action and context as mutually inter-related. Action is seen as both context-dependent and context-creating (Duranti and Goodwin 1992). Because what counts as contextual is "situated", and can thus be only determined locally on case-by-case basis, these scholars often add a very restrictive clause to the understanding of "context" as an efficient cause (see e.g. Schegloff 1997). Context can thus be assumed to have an influence only "insofar as a researcher can display that the participants themselves in their talk show that they have attended to or are being influenced by that feature of context" (Tracy 1998, 8). Relatively little attention is here given to context outside the talk or scene of action – the "exogenous" or "broad" context of action. As Latour (2005, 168) notes, this exposes a researcher to an insoluble paradox: "when she sticks to interactions, [the inquirer] is requested to go away and to 'put things in their wider context'. But when she finally reaches that structuring context, she is asked to leave the abstract level for 'real life', 'human size', 'lived-in' sites".

In this chapter, we suggest that one of the reasons scholars are caught in this difficult conundrum is that both these approaches take context as a representational issue, rather than a pragmatic phenomenon. In other words, they see context as a noun rather than a verb. They assume that dealing with context is an issue that concerns those who engage in explanatory and representational practices: scholars, inquirers, and other investigators. In this chapter, we instead build on a practice-based approach to understanding organisational phenomena, and our previous explorations of CEO practices of keeping 'in the know' (Nicolini, Korica and Ruddle 2015, Korica and Nicolini 2016). We also join forces with colleagues working to insert further rigour into the study of context (Fitzgerald et al. 2002, Dopson, Fitzgerald and Ferlie 2008). We do so to outline the contours of an alternate analytical understanding. Unlike conceptions of context as stable, 'out there' phenomenon with unmitigated power and effects, we suggest that context be analytically understood as *members' concern continually made present through particular kinds of attention and action*. This presents a direct answer to the second question driving this book, namely how do actors understand, experience and engage with context in a given situation or phenomenon? Specifically, contextualising action is a continuously present concern for actors in general, and healthcare executives specifically, studied here. It follows that context can be better understood (analytically) and traced (methodologically) by exploring how organisational individuals, such as chief executives, engage it in everyday work.

For us, engaging here implies a *joining together*: relating different events and concerns in ways that make them meaningful in specific ways, via distinct relations and discursive practices. We thus conceive context as a web of connections in action, resulting from observable continually connecting actions. Such an approach echoes the etymological roots of the word itself, in which context, from Latin *contextus* or "a joining together", was originally formed from a past principle of *cum* ("together") and *textere* ("to weave, to make"), or "to weave together" (Burke 2002). In other words, we argue it matters less, and is less empirically accurate, to speak of what context *is*, than to trace the ways in which *context is made to matter*, in characteristic ways, by particularly influential individuals during their ordinary activities. This in turn requires taking as a point of departure the work and perspectives of managers whose behaviour is under consideration, and considering how they organise and action their attention vis-a-vis events and situations they need to navigate. Put more directly, CEOs have a unique capacity to shape and set out a context for others to act within and in relation to (Ghoshal and Bartlett 1994, Grint 2005). They are at the centre of that web of connections, and legitimised by their role to join these together. In addition, their understandings of context affect their work as well. As such, tracing these processes, with CEO work as our departure point, holds unique analytical promise for conceptually understanding context in more complex ways.

In the rest of the chapter, we develop our argument building on a longitudinal study of seven chief executives in the UK National Health Service (NHS). We combined extensive shadowing with informal and formal interviewing, and documentary and diary analysis. This empirical approach allowed us to respond to long-standing scholarly calls to 'make work visible' (Barley and Kunda 2001), by paying particular attention to complex lived experiences of individuals to better understand work itself (Akin 2000). We will argue the same approach helped us to 'make context visible', by tracing connections in actions as part of CEOs' daily activity, and so also enabled the proposed analytical contributions to literatures on context, managerial work, and beyond.

ACCOUNTING FOR CONTEXT IN MANAGERIAL WORK: PREVIOUS EXPLORATIONS, PROMISING OPENINGS

As argued by scholars like Stewart (1976), context is particularly relevant when it comes to an enriched understanding of managerial work. Specifically, if we recognise that all work is necessarily situated, the empirical question that arises is how does this come to matter to managerial work in particular? As noted above, Mintzberg (2009) suggested managerial action is influenced by external, organizational, job, situational and personal contextual factors. Stewart's (1976) investigation, which was part of a much wider programme of work (e.g. Stewart et al., 1980), in turn teased out task-based categorical differences between jobs, focused on variations in demands, constraints and choices. Other, more recent explorations include Tengblad's (2006) study of four Swedish CEOs, Dargie's (2000) investigations of public sector chief executives in the UK, and Matthaei's (2010) calendar and interview-based study of German CEOs (for a detailed overview, see Tengblad and Vie 2012, Korica, Nicolini and Johnson 2017).

However, to the extent that context was acknowledged as relevant in authors' accounts, it remained largely a descriptor of the sample studied, or a baseline for direct comparison between individuals in light of some other analytical concern. In one such exploration, Dargie (2000) for instance highlighted the relative paucity of studies comparing the differences in observed managerial work of chief executives in private and voluntary sectors versus the public sector, particularly following the introduction of New Public Management (Hood 1991). Her study thus featured eight UK chief executives – four in public sector organisations, two in voluntary, two in private sector – who were studied via calendar analysis of one year each, observations of work over a week, and interviews. The (admittedly rather short) paper engaged Mintzberg's (1973) ten behavioural roles to identify some ways in which the studied CEOs' performed roles differed. This included particular local demands, institutional tensions (e.g. limited resources meant CEOs in NHS had to involve themselves in resource allocations, but could not, for instance, easily dismiss staff), environmental limitations (e.g. media coverage of adverse events in hospitals influenced that CEO's immediate priorities), and organisational actors (e.g. presence of medical staff in NHS organisations presented unique challenges of managing professional autonomy). However, in its brevity, the paper emphasised existence and nature of such differences, over the key underlying question of how they mattered in practice.

Specifically, the question of how such CEOs not just oriented their work and understood it under different emerging situated challenges, but also how they came to define their own contexts, by giving attention in discrete ways to some aspects, rather than others, has remained largely unexplored. This is regrettable, as chief executives could arguably be said to be especially concerned with the 'broader' context, given a key aspect of their work entails acting as the linking pin between the organizational environment and its internal differential experiences and understandings (and vice versa) (see Mintzberg 1983). As Sausman (2001, ii17) argued in relation to the NHS, "chief executives have probably a unique range of contacts and a unique perspective on information regarding policy and operations and so they form a natural information source or "conduit" within and outside the organisation, often being required to translate abstract ideas and broad policy objectives into what they mean for the organisation". Despite this, the dynamics and analytical relevance of such a position have rarely been explicitly problematized vis-à-vis scholarly understanding of context. This is especially regarding how those executives come to grapple with continually shifting understandings of their setting(s) over time; a process in which they were not just passive, but also active participants.

As one notable exception, Stewart and colleagues (1980, 9) outlined how NHS district administrators (today's chief executives) operated in a work setting where "both demands and constrains may vary over time and thus affect the opportunities for choice. The individual job-holder also creates his own personal demands and constraints, which will limit his [sic] choices, it least in the short term". They gave the example of agreeing to serve on a certain committee, which then brought with it certain subsequent demands, like attending other meetings, as well as constraints, like others' expectations that may come from this new role. However, to the extent that this account introduced managers as active crafters (at least to some extent), the analytical attention remained rather limited: focused on how this matters for, and restrains that manager's work alone. If we accept however that chief executives' position comes with a much broader remit of potential influence, this opens up room for recognising the relevance of such crafting beyond own work choices, such as committee participation. In other words, Stewart and colleagues (1980, 19) recognise the key relevance of the "focus of attention", either inwards or outwards, in such administrators' daily work. *How* this focus is operationalised by a particular executive in terms of being given certain meaning, in distinct ways, of relevance to others as well, remains insufficiently explored.

STUDYING CONTEXT IN ACTION: AN ACCOUNT OF OUR APPROACH

Our empirical study of NHS executives offers fertile grounds to address this relative absence. Specifically, as practice and process-oriented scholars, we designed the research with already an existing analytical orientation toward context, though this was not the formal focus of our study. The analytical guidance here is to ensure that investigations of context and its relevance pay attention to both situated expressions and doings within that organisation (which includes sayings and materialities), but also how references are established with 'wider' features, such as other organizations, legal oversight and political norms, characteristic of that time and place (Nicolini 2013). To this end, methodological approaches that facilitate attention to both, like Nicolini's (2009) 'zooming in and out', are particularly appropriate. In our case, we engaged shadowing (McDonald 2005, Czarniawska 2007, Quinlan 2008). This is a highly mobile method, particularly suitable for appreciating the "social embeddedness of managerial behavior" (Noordegraf and Stewart, 2002, 440), and for tracing relations, specifically how individuals make sense of their surroundings and themselves in relation to others (Vasquez et al, 2012).

Between March 2011 and May 2013, we conducted an ethnographic study of seven healthcare CEOs of acute and mental health National Health Service (NHS) trusts in England (for further detail on our methodology, see Nicolini, Powell and Korica 2014). The CEOs managed organizations that included multiple hospitals (e.g. three large hospitals) and a variety of clinics, annual budgets exceeding 500 million pounds ($800 million), and from 2,000 to 10,000 staff. They were shadowed for 5 or more weeks each (except one, where observations lasted 3.5 weeks). We were able to document most aspects of work, or collected post-hoc accounts for work we could not observe. We took field notes and direct quotes 'in-vivo' using tablet computers, or shortly after when appropriate, paying particular attention to key analytical elements of practice, including objects engaged, people referred to, and interactions undertaken (Nicolini, Gherardi and Yanow 2003, Miettinen, Samra-Fredericks and Yanow 2009, Feldman and Orlikowski 2012). We also conducted formal semi-structured interviews with CEOs and consulted about one thousand pages of documents, including meeting papers, articles the CEOs referenced, and external publications consulted.

JOINING TOGETHER IN ACTION: TRACING THE RELATIONAL, DISCURSIVE ACCOMPLISHMENTS OF CONTEXT

As common with ethnographic studies, the richness of our data far exceeds the scholarly space available to share it. As such, we have chosen to engage with two aspects to tease out the emerging analytical features of context-in-action we observed.

Constructing the "out there" in practice and through practices

One of the things that we observed in our study is that understanding what was "out there" and staying on top of what was happening within and around their organisations was one of CEOs' main preoccupations. As we recounted in greater detail in Korica and Nicolini (2016), CEOs were perpetually scanning and monitoring their environments to make themselves knowledgeable about things that were worthy of attentiveness because it could be joined in some way to present work. This was something weaved deeply, via observable practices, within the texture of their everyday activity. The "context" thus was actively enacted (Weick, 1979), through very specific activities that gave relevance to certain aspects and actively backgrounded others, *at certain times*, given their work and tasks in that moment.

To give one brief example, all CEO engaged in practices of deliberate monitoring, such as keeping up with the specialised press and running oversight meetings. They also actively constructed the 'out there' by heedfully participating in activities that ostensibly had other objectives. As one of our informants, an experienced executive newly in the job of running a large teaching hospital, put it during our fieldwork:

> *"…what I do is I attend meetings that I've been booked into […] and I use that as another data source… But the really valuable bit for me is being in a room with peers and just chatting about what your current issue is, and then you get a real sense of where we sit, as kind of benchmarking data." [CEO 2]*

CEOs thus consciously and purposively used meetings as an opportunity to understand what others considered worthy of consideration, and to review their attention rules. In addition, even the most ordinary social conversation (e.g., meeting someone while walking to the coffee shop) echoed a similar posture: "Good to see you! How are you? *And what is new*?" In summary, the 'context' was not something that the CEOs found, but rather something that they actively and routinely enacted with others and through others. This context was neither an external set of objective conditions, nor a simple projection of their 'internal' subjective mind. Rather, it manifested itself in practice as an evolving set of concerns and understandings regarding circumstances that needed to be taken into consideration as potentially relevant.

What should we care about? Accomplishing context via joining together

The relational, discursive and bodily construction of context extended beyond simply bringing to bear an 'out there' understanding with pragmatic relevance for the organization. It also implied making connections between established relevancies and organizational action. Consider the following short vignette.

> *VIGNETTE 1: We are in the open plan office at the trust HQ. CEO6 is sitting at his desk. The CEO [who has been in the post over four years, following a private sector career, and heads up a successful mental health trust] attends a meeting to prepare for the [organisation's Equality and Diversity] conference, and hears about sector Commissioning Board meetings being streamed live via video. He then checks it out online, then immediately "emails the link to the video to his Chair". He explains to me once more, before doing that, their discussions re public board meetings, which they have been having as an organization for some months now. So this is helpful in his view (i.e. he is linking this to existing discussions with the team re how the board of the organization can demonstrate public accountability in light of FT [NHS foundation trust] requirements for public boards, and what he sees as the Chair's resistance toward that, given the Chair is from the private sector and is not used to such oversight). After a few minutes, "the deputy comes in. The CEO tells her that he is just about the send an email with the video link around further. In it, the Commissioning Board explains just how they are approaching*

these meetings, which is quite helpful. […] He then opens a PDF outlining arrangements for FT public board meeting". He then makes a call, "checks if the Chair received his email re this. Asks him to please take a look at the link shared, noting the Commission Chair's introduction is very helpful". (Extract from research diary)

This extract importantly illustrates the CEO's practices of orienting attention, not just in terms of what he attends to, but also with regard to doing that orienting work for notable others, i.e. the Chair. We can also detect the important discursive work of making connections, through which context is made present. Institutional requirements regarding public boards may exist at this time, such as those for foundation trusts referenced in the vignette. Here we see however how they are made sense of within broader scope of organizational activities, priorities, actors and understandings, at a certain time. This process is *active*, not passive. We witness the CEO not just accessing the Commissioning Board website to inform himself, but also explicitly making that connection for his organisation's Chair of the Board as well. Such a joining is importantly not without a distinct sense of understanding or relevance – the link is highlighted as part of a broader discussion about how their public meetings might need to take place, the CEO's understanding of Chair's existing resistance, and his efforts to position the trust as notable for 'public accountability'. In other words, the joining is purposeful and strategically directive. It is infused with particular meaning, toward a particular end. This is evidenced in the CEO's follow up call to the Chair, ensuring that particular notice be paid to the email shared. As such, not only is the process of such joining actively continually accomplished, but so is context itself, as inherently variously interpreted and understood.

This is made further evident if we consider another short vignette.

VIGNETTE 2: At an 8 am executive team meeting, the gathered executives "discuss the problems within the trust concerning people not showing up, using being busy as an excuse and cancelling meetings. [CEO4, a new executive brought in to turn around a highly challenging hospital] notes he is really worried about the accounting

> *firm coming in and observing several key meetings. They need to be a 7 [on the regulator's scale used to assess quality of their corporate governance], otherwise the regulator will lose faith in them…". A few days later, "the Chair comes in to update the CEO on his chat with the regulator. The Chair gives him the surprising details of the conversation: it seems the local commissioners [who commission healthcare services locally for hospitals like his] have been giving information to regulator that is not accurate. He checks the shared information is indeed not correct. They agree the CEO will call the head of the regulator on Monday morning to reassure him of their exact plans." (Extract from research diary)*

This extract in turn illustrates the relational work of joining across customarily perceived 'levels' of context. Here, internal challenges are given particular consideration and meaning by being explicitly linked to broader, supra-organisational concerns regarding regulator assessments. This effectively re-orients what can be seen as a mundane operational issue (i.e. people not attending meetings) into a much wider, and therefore consequential matter of strategic concern (i.e. people not attending meetings as a signal of a strained organisational setting or culture, which is one of the broader considerations the regulator takes into account in making their assessments, which are important to get right because they are already seen as struggling). This suggests that while it may be analytically and presentationally helpful for scholars to see them as 'levels', such experiences of context are in everyday practice instantaneous, relational, ontologically 'flat' phenomena (Emirbayer 1997, Bradbury and Lichtenstein 2000). In other words, they are experienced, found, expressed and crafted with certain meaning *in* individual moments of relational joining. In addition, the example depicts other individuals bringing things to CEO's attention, which the CEO then uses as input into his further processes of joining, to enable further action. In other words, it highlights that while the active role of a CEO vis-à-vis context may not always feature him or her personally bringing in certain aspects to initial attention, they nevertheless remain an active participant in the overall, necessarily relational process. Furthermore, the example highlights that such processes happen over time, and therefore feature a number of different elements joined into particular understandings of context as continually shifting. Finally, the concluding sentence once more reiterates the CEO's active role. Specifically, distinct understandings of the 'external' context are not only made sense of by linking to 'internal' conversations and dynamics, but by CEOs conversely making connections to inform 'external' actors, such as regulator's shifting understandings, thereby inevitably influencing to some degree the latter's work and nature.

DISCUSSION AND CONCLUDING THOUGHTS

The above exploration of NHS chief executives' work highlights context as continually accomplished. The CEOs made context present and meaningful by actively constructing it via a multi-step, recursive process. This involved i) attending to context in certain ways (by linking it to existing understandings, with a view toward identifying certain meaning), and ii) making that context work (by joining it with current or future doings, as well as existing understandings, to imbue meaning further and enable action beyond this point in time). Importantly, the latter reflects a unique role played by CEOs, as joiners and shapers not only of their meaningful and thus actionable contexts, but also those of others, including actors beyond their organisations. The process also suggests that features of what we customarily see as 'external' or 'internal' context are never simply 'out there' or 'in here'. Instead, they become present – temporarily, in that moment – by being accorded meaning, via discursive and relational dynamics of crafted joining. This implies *both* recognition and action: features are joined together toward something, even if that something, in terms of work and actions, is yet to be performed.

This holds a number of wider analytical and methodological lessons for future investigations. With regard to our contribution to the literature on managerial work, one apparently similar theorisation is Stewart and colleagues' (1980, 76) *linkman* and *shaper* roles by NHS district administrators. However, while for them the key aim of such roles appears to be functional, in our observations vis-à-vis context, the work was more interpretive. The CEOs *continually* outlined, and therefore in some ways crafted, a particular understanding of the world in which such work might then be attempted. This has clear implications for better appreciating their managerial work, but also analytical understanding of context. With regard to latter, it suggests that it is in those relational moments of accomplished interpretation that customary 'levels' of context as an analytical category (i.e. 'macro, meso and micro', see McNulty and Ferlie 2002) are linked *and* given meaning through such joining. In other words, to the extent that such features of so-called 'external', including 'macro', context exist outside of these relations, this existence is of scant practical relevance to the practices of those individuals – at least at that moment in time. Interpretation of context as a *joining together of emergent sense* thus implies continued work, inherently limited or specific in both the components it chooses to bring together, and the ways in which such bringing together is accomplished. This also necessarily means that conceptually, any such context is a temporary phenomenon. To the extent it is ever fixed, or exists, it is only momentarily, in relation to distinct words and actions. These are then quickly dissolved or made fluid again as further relational and material action occurs.

The analytical and methodological implications for scholarship are clear. Analytically, rather than outside-in tracing of externally reportable features, like regulator presence or scheduled meeting times, far more relevant for understanding managerial work is internal tracing of lived realities. Relational spaces and times, in which such sense is made, may well differ considerably. The important question therefore, not just for better appreciating managerial work, but also connected matters of accountability and regulation, is *how* and *why* such traces of accomplished sense differ exactly, and *with what subsequent effects*. This crucially recognises power (see Mintzberg 1980, Grint, 2005), both in abilities to initiate such interpretations, and to have them count in certain ways, beyond that chief executive's work alone. It reminds us that if context can be created, including in ways we depict above, then explicit consideration of *whose* context this may resultantly be, and with what consequences, is necessary. This has clear relevance for academic understanding of managerial work, but also of power, conflict, and resistance in situations of relational and constantly multi-directional, rather than solely individual and retrospective sensemaking (discussed in more detail earlier in this book). For instance, Vignette 1 could have been further explored, space permitting, to situate it in the wider power struggles at this time between CEO6 and his Chair. Specifically, the latter had a particular, private sector-driven understanding of the role of a Board, whose remit the

CEO in turn actively tried to manage and circumscribe in certain ways. This in turn serves as further evidence of why CEOs in particular represent such a valuable analytical case for understanding context. It is precisely because their role features such a density of connections to join, and because it demands that they account for nature and consequences of contexts they create, that studying their accomplishments of context in practice offers rich lessons for scholarly understanding.

Methodologically, this implies that empirical investigations of how particular joining together comes to advance certain understandings of context ought to be ideally supplemented by some consideration of the latter's fate. This is not just regarding the work of that individual, but for others to whom these are offered as direction, and to the (eventual) fate of the organisation as a whole. Such focus echoes Nicolini's (2013) "strong programme" of studying practices, in which registering them is not sufficient. Instead, attending to dynamics of difference over time, to explain, is essential. To that aim, future studies that investigate how situated constructions of context by managers and individuals in different positions inform and relate to each others' work would make a valuable further contribution to literatures on context and managerial work.

Of course, the question of *whose* context must also be asked of us as researchers. In particular, we must openly acknowledge that the particular "theory method toolkit" (Nicolini 2013) we engaged allowed us to trace and see context in certain ways, but not others. As such, this analytical account is enabled, and in part produced, by our methodological choices – we traced the phenomenon we could. We did so however driven by clear analytical aims: the relative dearth of dynamic, processual studies of context, and a commitment to the "strong programme" to allow for more nuances theorisations of complex practices. Such work however, and future opportunities we advocate above, are necessarily complex and difficult. They are made more so by our scholarly limitations regarding conducting longitudinal observational studies, which this would demand (see also Sminia 2017 on Pettigrew's approach to studying context). However, such studies are likely to meaningfully contribute by *complexifying* already complex organisational realities, rather than reducing these to fit limitations of outlets, or preferences for simple representations (Tsoukas 2017). As Walsh and colleagues (2006, 667) warned, "more often than not, our theories are culture bound, biased toward stability, and contextually restricted. As a result, our work is relevant to a dwindling fraction of the world's organizations and organizational contexts". Our attempt here should therefore also be seen as another contribution to redressing this balance, by introducing further analytical fluidity to the key concept of context itself.

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