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Garfinkel on Strategy: Using Ethnomethodology to Make Sense of "Rubbish Strategy"

Abstract

This paper has three aims. First, it presents what the term ethnomethodology means and explains some of its central concepts and tenets. Second, the paper illustrates an ethnomethodological approach to studying strategy by drawing on a fieldwork study of the development of a waste management strategy in a UK Local Authority, conducted by the first author. Third, the distinctive approach that ethnomethodology takes to the study of social organization is presented in order to outline what it could offer to the understanding of *strategic* organization in particular. The paper concludes by discussing the insights that ethnomethodology can offer in the strategic management field, including existing applications and potential future lines of enquiry, particularly in the field known as Strategy-as-Practice. The conclusion advocates a move away from rational analytic models, proclamations and prescriptive treatments of strategy towards studying the more mundane work that enables strategic action to take place, notably the production of *accounts* of various kinds. It is argued that through accounts, members produce the social facts that generate 'strategies' of various kinds. This necessitates a studying fact production 'in flight'. Strategic organization is thereby conceptualised as an ongoing achievement of member's ethno-methods for producing it.

Introduction: Harold Garfinkel and Ethnomethodology

During his lifetime and since his death in 2011, Garfinkel has achieved the status of one of the most original thinkers in sociology. The publication in 1967 of Garfinkel's landmark text, *Studies in Ethnomethodology*, divided academic opinion. It was met with vehement criticism by 'mainstream' sociologists of the time. Even now, ethnomethodology retains a somewhat elusive and unorthodox position in its 'home' discipline of sociology, and is certainly far from mainstream in the business and management field. From its inception, ethnomethodology was never a unified field or single theory. Equally, today it is best described as a splintered set of related sub-fields (Button, 1991). One of the most significant relationships is that between ethnomethodology (EM) and conversation analysis (CA), the latter field emerging from the work of Harvey Sacks. Some people use the term EM/CA to highlight this link (Llewellyn & Hindmarsh, 2010).

Our aim in this paper is threefold. First, we seek to discuss what the term ethnomethodology (EM) means and explain some of its central concepts and tenets. Second, we illustrate an ethnomethodological approach to studying strategy by drawing on a fieldwork study of the development of a waste management strategy in a UK Local Authority, conducted by the first author. Third and finally, we discuss the distinctive approach that EM takes to the study of social organization and what it could offer to the understanding of *strategic* organization in particular. We conclude by discussing the insights that EM can offer in the strategic management field, including existing applications and potential future lines of enquiry, particularly in the field known as Strategy-as-Practice (Golsorkhi *et al.*, 2010). As such, we aim to outline how future strategy research can address Clegg, Kornberger and Carter's (2004: 25) plea to "focus on the ethnomethods of everyday strategists".

What is ethnomethodology?

The term 'ethnomethodology' can be quite confusing because it is not itself a research 'method' or 'methodology' like, say, interviews or questionnaires. Nor is it a social 'theory' as such (Button, 1991). Rather, it is a distinct way of doing social science. Button (1991: 1) describes EM as a "foundational respecification of the human sciences". EM seeks to 're-specify' the issues, topics and concepts of mainstream social science. The term "re-specify" refers to taking those concepts used within mainstream functionalist social science to explain social action, such as 'rules' or 'norms', and study them as endogenous accomplishments of knowledgeable members of society rather than exogenous 'facts' or 'forces' that cause social order (Button,

1991). EM *inquires* into what conventional sociologists view as their *foundations*: namely, the existence of social facts. Garfinkel (1967: 79) referred to this as studying "fact production in flight".

It may be useful to break the term ethnomethodology down into its component parts. "Ethno" refers to a social or cultural group, however large or small. This could be a small project team, an organization or a whole institutional field. "Method" refers to the methods or procedures that competent members of that group use to go about their social life. And finally "ology" simply means "the study of". Put simply, then, ethnomethodology is the study of the practical methods through which members of a particular social group accomplish social order and organization. Take a simple example like a cough. A cough can of course be merely a physiological response to needing to clear one's throat, but it can also be a *social* method (an 'ethno-method') for, say, signalling disagreement, displaying scepticism about an account, interrupting someone, or signalling that someone is blocking your path.

The answer to the question of precisely *which* of these various 'senses' of the cough applies on any given occasion is generated by the *stock of social knowledge* (Schutz, 1967: 80) that competent members of a social group use to 'recognise' its meaning in that context. For example, members may have knowledge that, in particular situations, coughs that are particularly elongated, particularly short, particularly over-dramatised, or accompanied by a 'roll of the eyes' signal that that cough is not just 'clearing the throat' but has a different social meaning. Thus, EM is fundamentally about sensemaking – how people make sense of (and in so doing *constitute*) their social world. As such, EM has shared concerns with sensemaking research inspired by Karl Weick (1969, 1995) – an important connection with Brown's (2015) paper in this special issue. Certainly, Garfinkel had an intellectual influence on Weick's work. Handel (1982) also makes the sensemaking link explicit in his book title *Ethnomethodology: How People Make Sense*. While ethnomethodologists might not use the term sensemaking itself very often, they do use terms such as "reasoning procedures" and "inferential practices" to describe similar ideas (Samra-Fredericks, 2010a: 231).

Notwithstanding this link to sensemaking research, EM is not interested in the private cognitive processes commonly involved in approaches to sensemaking underpinned by social psychology (e.g. Weick, 1969; 1995). The interest is in those methods through which members *socially display* their "sense" in ways that make inter-subjective organized action possible. For

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example, members will *display* the meaning they took from a cough in their next action – making these ethno-methods *available for empirical study*. This is also an important methodological point: the analyst does not seek to provide their own second-order theoretical explanation of "what is going on here". Rather, they seek to study how order is generated within the first-order methods - what Button (1991) calls "theories-in-use" - employed by members themselves. Hence, the analyst sticks to "what is demonstrably orientated to by the participants themselves" in their next action (Samra-Fredericks, 2010: 2149). This is done by undertaking fieldwork observation or audio- or video-recording this activity as it happens. Hence, EM is not simply a set of theoretical constructs to guide inquiry but is a thoroughly empirical programme of research that seeks to uncover the methods that constitute social organization – whether that is the social organization of coughing or the social organization that accomplishes what we call "strategy".

While the recognisability of coughs seems far away from the field of strategic management, it is precisely this same approach that an ethnomethodological approach to strategy would wish to study. What ethno-methods do strategists use to come to recognise an environmental change as a "threat" or "opportunity"? Or a set of internal activities as a "strength" or "weakness"? What ethno-methods are used to decide what is the organization's "core competence" or "dynamic capability"? In fact, this programme of research is already underway thanks to the ethnomethodological work by Samra-Fredericks (2003, 2004, 2004a, 2005, 2010, 2010a), which has given rich insights into how strategists come to "recognise" and produce accounts of their strategic options, such as when and why to make acquisitions, what their core competencies were, and how to secure competitive advantage vis-à-vis rivals.

Ethnomethodology emerged as a critique of the structural functionalist sociology founded by Durkheim and championed by Parsons (who was actually Garfinkel's doctoral supervisor)[1]. In particular, ethnomethodology took issue with the functionalist project to identify the social structures, facts, variables and forces that are presumed to create social order. EM addresses the same 'problem' or 'topic' as sociology – namely, how social order and structure is generated or transformed – but inverts it and 'turns it on its head'. Rather than seeing people as judgemental 'dopes' (Garfinkel, 1967: 68) who are 'pushed and pulled' by social facts –

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[1] Durkheim's position was later refined and, in his sociology of religion, his position substantially evolved from his earlier functionalist work.

such as a social rule, norm, or value – it views social order as the *on-going, artful and knowledgeable accomplishment of members* (Garfinkel, 1967). Members, it is proposed, employ their stock of knowledge and reasoning procedures to produce the 'objective facts' that other sociological approaches treat as unproblematic. In strategic management, then, this would mean studying how 'facts' about an organization's environment, it's resources or its competitive position are generated through members' ethno-methods for strategizing.

Two important notes are necessary here. First, this emphasis on 'knowledge-ability' must not be confused with claiming that members are always *conscious* of these ethno-methods. In fact, a central project of EM is to explicate and systematically document the typically *taken-for-granted* ethno-methods used by members. However, it may not be obvious to someone who is not a competent member of that social group: they would not be able to "see" and "hear" what competent members do. Given that EM is the study of "common-sense" (Schutz, 1967: 9), the question it then asks is: how does this "obviousness" get produced by members? Second, this emphasis on the 'ongoing' and 'artful' accomplishment of social organization does not mean that 'anything goes': that any social action is viewed as sensible or that any account will be accepted or ratified by others. Quite the contrary: EM is centrally concerned with the more or less institutionalised and unequal opportunities and rights of different social actors to produce accounts and have them accepted by others (Watson & Goulet, 1998). The methods for deciding *who* gets to produce particular accounts or actions, and the methods for establishing *which* of these prevail or dominate, are the very ethno-methods that EM is interested in studying. This is what judges in courtrooms and organizations have to do on a daily basis (Pollner, 1987). For strategic management, then, this brings EM to the study of *how* particular versions of the future position, scope or direction of the organization are established as the 'right' strategy.

Ethnomethodology's critique of functionalist sociology applies equally to the so-called 'macro' social order of the 'rules', 'norms' and 'values' purported to emanate from institutions such as the State, the education system or religious institutions, which are understood to govern society at large, and the so-called 'micro' social order of a few people forming an orderly queue at a till. Indeed, for EM, this distinction between micro and macro is a misnomer (Hilbert, 1990), as all social action is endogenously generated, and the classification of EM as a 'micro'

approach has been strongly rejected (Garfinkel, 2002)[2]. Thus, EM does not ignore social structure and organizational structure; rather it re-specifies it as an ongoing accomplishment of members: what Boden (1994) refers to as "structure-in-action" and "organization-in-action". It is also not silent on the 'big issues' of structural inequality in society, even though the commitment to so-called "ethnomethodological indifference" (Button, 1991: 86) means it deliberately does not 'take sides' and privilege or ratify certain versions over others. In fact, EM has delivered significant insights into how 'unequal' outcomes occur by studying how various inequalities (according to gender, race, class etc.) are produced through institutions such as the education system (Cicourel & Kitsuse, 1963; Leiter, 1975; Mehan, 1979) and the judicial system (Cicourel, 1968).

Understanding accounts: Reflexivity, indexicality and inconcludability

According to ethnomethodologists, ordinary, everyday life is accomplished through moment to moment sense-making. Such sense-making is oriented toward accountability (or account-ability; more on this hyphenated term below). For example, participants to a conversation engage in mutually constituting a sense of the conversation for the occasion of the conversation. If you ask a stranger "Do you know the time?" and they respond "It's half past three", this show us what ethno-methods they used to make sense of the question. Their ethno-method in this case was to "read" the question as a request for information (i.e. please tell me the time), not an inquiry into the knowledge the speaker has (i.e. whether they know the time). If the stranger responds "Yes, I do know the time", we might have to enter into a repair sequence by explaining that we were not inquiring about their knowledge-status, but actually wanted to know the time. The accounts demonstrably make sense of the first turn and are oriented to the possibility of being "held to account" by subsequent turns.

However, EM does not just focus on the moment to moment sense-making of *conversations*. For Garfinkel (1967: 33),

> "**Any setting** organizes its activities to make its properties as an organized environment of practical activities detectable, countable, recordable, reportable, tell-a-story-about-able, analyzable – in short *accountable*." (bold emphasis added).

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[2] Ethnomethodology would, however, be interested in studying how members of a social group themselves make distinctions between what is 'micro' and what is 'macro', for what practical purposes, and how connections in scale and scope are accomplished.

Ethnomethodologists are as interested in professional settings, such as settings of strategy formulation or implementation, as they are everyday settings (see for example Suchman (1993) on air-traffic control centres). They are as interested in written texts, reports and decisions as conversations (see for example Garfinkel (1967) on medical records). They are as interested in extended programmes of action as single moments of interaction (see for example Heath, Hindmarsh and Luff (1999) on the work of London Underground train drivers). For ethnomethodologists, texts, graphs and documents of various kinds, such as strategy texts, management accounts or financial reports, require study within the interactions through which they are made to make sense (Watson, 2009). For example, recent work in Rouncefield and Tolmie's (2011) book *Ethnomethodology at Work* considers how people in organizational settings produce numbers that transform the organization into a 'calculable' entity (Hughes, 2011), how activities are rendered intelligible in relation to formal plans (Randall & Rouncefield, 2011), how meetings are organized around documents and artefacts such as agendas, projectors and spreadsheets (Hughes, et. al., 2011), how documents – both paper-based and digital – are used for mundane coordination and decision-making (Hartswood et. al., 2011), and how various texts are 'read' and made sense of in situ (Rooksby, 2011).

As we noted above, the idea that we should study moment to moment sense making does not equate to an 'anything goes' policy. As Watson and Goulet (1998: 97) argue:

> "To say that people produce the world is not the same as saying that they are solipsists, that they are able to fashion the world according to their whims. ... The mistake is to think of the process of production as one that is free of constraints when in fact it is a structure of constraints. People produce candidate versions [accounts] of the way things are, and these may be accepted, shelved, or disputed according to more or less institutionalized criteria."

For example, not everyone is recognised as able to produce an account or social action that is deemed 'strategic' or 'enterprising' (Whittle & Mueller, 2008), and certain actors, such as senior management, occupy institutional positions which might be oriented toward by other participants as giving them a warrant to provide accounts of what the organization should 'be' or 'do' (e.g. what markets to enter/withdraw from, which business units to invest in/shut down, etc.). Mastery of the ethno-methods of what counts as "doing strategy" certainly positions actors into the privileged position of being deemed to be "strategists" (Carter, Clegg & Kornberger, 2008).

Strategy work – in settings such as Board meetings, consultancy presentations, practices of writing of strategy documents – are viewed not simply as 'contexts' in which strategy takes place. For EM, the *situation* of the interaction is oriented toward and made apparent *within* the interaction. What might conventionally be termed a 'context' does not sit outside the occasion of interaction (Livingston, 2006) but rather is actively made apparent as a matter for orienting accounts, accountability and sense-making within interactions. For ethnomethodological conversation analysts (see e.g. Llewellyn & Hindmarsh, 2010), this justifies their focus on members' methods for making sense in conversation rather than in, say, a detailed study of the context that might in traditional sociological analyses sit outside - and through some mysterious fashion shape - the nature of the conversation.

In Garfinkel's (1967) study of LA coroners' work to examine dead bodies and decide whether or not the person had committed suicide, many of these features of sense-making are made prominent. The focus is not just on conversational exchange, but also what the dead bodies can be made to report on. What might traditionally be termed 'contextual' features that might be sought for explaining a death are made apparent within the setting and through the dead body. Rational, concerted, accountable actions "somehow" turn partial things into accounts of how a person died in society – and the "somehow" is the important part for analysis (1967: 10). This became apparent to Garfinkel in his study of calls to a Suicide Prevention Centre:

> "Organizationally, the Suicide Prevention Centre consists of practical procedures for accomplishing the rational accountability of suicidal deaths as recognizable features of the settings in which that accountability occurs" (1967: 9).

Ethnomethodologists suggest that this kind of on-going sense-making can be directed toward matters which are account-able (Garfinkel, 1967; Lynch, 2000). The hyphen here is used to denote matters that are able to be (or make) *an account* of some matter. The ability of something to be an account of some matter is not a prior state that then shapes, for example, a business meeting or a strategic decision making process. Instead, what comes to count as the kind of account that is deemed "an account of some matter" is the outcome of the interaction.

For ethnomethodologists, interactions are treated as ordered and organised forms of social life in which three key features - reflexivity, indexicality and inconcludability – constitute the ongoing production of social organization. We will briefly consider these three concepts in turn. Firstly, reflexivity for ethnomethodologists is specific: it is not a methodological or

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epistemic reflexivity or academic virtue (Lynch, 2000). Reflexivity is not tied to the individual who holds a reflexive capability (a kind of individual meta reflection on the interaction), neither is reflexivity a direction for social scientists to take their research (for example by reflecting on the influence they had on the generation of their data). A feature of the ordered aspects of interactions *are* their reflexivity, not their degree of reflexivity. Reflexivity, for ethnomethodologists, relates to an ordinary feature through which sense is made in interactions. Weider's (1974) study of the 'deviant' code of conduct in a half-way house for rehabilitating paroled prisoners offers a good example. Weider asked one of the parolees about the extent of drug use in the halfway house. The parolee replied: "You know I can't snitch" – a reference to the so-called 'convict code' of loyalty to fellow inmates. Through his reply, the parolee *reflexively constituted* the exchange as "being asked to 'snitch'". The account thus generates the very definition of the situation, it creates the very thing that it describes[3].

Secondly, within such interactions, particular turns in conversations, acts in an on-going series, or treatments of a particular document, for example, are indexical – their sense is tied to the occasion of their use (Lynch, 2000). Indexicality is a term taken from linguistics to refer to words which differ in meaning according to their context of use (what situation the word 'indexes' or 'points to'), such as "you" or "we". However, ethnomethodologists propose that all social actions – utterances, movements, gestures, artefacts, texts, and so on – not just certain words, are indexical. For ethnomethodologists indexicality means that social actions do not contain an inherent 'sense', but rather rely on 'interpretation in context', where 'context' is itself indexical[4]. A strategy document, for instance, could mean very different things when in the hands of senior management to employees, consumers or competitors. A move by a competitor, similarly, could be interpreted very differently by two rival firms, depending on what they are taken to 'index'.

Reflexivity and indexicality are more or less inseparable for ethnomethodologists; they are features of sense-making in interactions. Returning to our previous point regarding context, ethnomethodologists argue that analysis must focus on "action-in-context given that not only

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[3] This is similar to what sensemaking scholars inspired by Weick (1969, 1995) might call "enactment".
[4] Weick's (1990) analysis of the interaction that preceded the Tenerife air crash provides an interesting example of how the same utterance was taken to 'index' two different contexts. The pilot's account "We are now at takeoff" was made sense of by the pilots themselves as a statement of their impending ascent by supplying the context of their aircraft movement up the runway, while the control tower made sense of the same utterance as referring to the takeoff *position* by supplying the context of a plane awaiting clearance.

does no concept of context-in-general exist, but every use of 'context' without exception is itself essentially indexical" (Garfinkel, 1967:10). The routine grounds for making sense of some account involve the constitution of a context within the interaction through which the sense can be made demonstrably apparent to others. Garfinkel (1967) utilised the term 'documentary method of interpretation' developed by Mannheim and Schutz for capturing this feature of interaction; that a turn in a conversation, for example, makes sense through its indexing (or 'documenting') of an accepted, shared context and the *work* of accepting is what reflexively constitutes the context as a recognisable entity to which a turn in conversation, for example, can point. In the cough example we gave above, for instance, this would involve assumptions about the motives and intentions of the person coughing that are used to make sense of precisely what this particular cough was intended to signal or 'index', in this particular setting and with these particular people present.

Thirdly, such sense-making actions in interactions are, in principle, inconcludable. Garfinkel (1967) suggests that in interactions such as conversations, the interactional accomplishment of sense (with successive turns displaying recognition that they have understood a previous turn in a particular way, are now producing a turn to be held to account by fellow interactors and expect a response in the form of a further turn) is always in principle open to further questions. Many of Garfinkel's infamous breaching experiments – such as his request to get his students to ask for clarification about what the question "How are you?" means – attempted to show exactly this point. Interactions such as conversations involve on-going attempts to make sense of a situation: each turn provides the basis for opening up (in principle) further possibilities for further questions and each further response provides the basis for further questions. For Garfinkel, every turn (in principle) provides for the opportunity to ask further questions or hold to account the preceding turn.

For Woolgar (1988) this combination of reflexivity, indexicality and inconcludability are features of what he terms the 'methodological horrors'. However, for ethnomethodologists, reflexivity, indexicality and inconcludability are not methodological horrors, but ordinary and routine grounds for making sense. That we do not endlessly ask questions – following the in principle inconcludability of sense making – is managed through the invocation of what Garfinkel (1967) terms an "etcetera clause". Such a clause in, for example, turns in a conversation simultaneously denotes that further questions could be asked, but will not be asked in order to get on with the practical matters to hand. In other words, for Garfinkel:

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"whatever is there is good enough in the sense that whatever is there not only will do, but does" (1967: 18).

Having outlined some of the main tenets of ethnomethodology, we will now move on to illustrate how it could be used to understand strategy by drawing on a study of a waste management strategy initiative in a UK Local Authority.

The Study

One of the authors of this paper (Dan) gained entry to study a particular local authority and its waste management strategy by simply emailing the waste management team. He was invited to an initial meeting in which his presence was welcomed as a potential resource, potentially assisting the local council in developing a new waste strategy (see below). Although access to the field site was relatively straightforward, carrying out an ethnomethodologically-inclined ethnography came with its own particular commitments (see Randall, Marr & Rouncefield, 2001). Following Garfinkel (1967) and Lynch (1998) among others, this entailed collecting naturally occurring data, getting close to the practices of the organisation and as far as possible unearthing the resources members themselves used to make strategic sense of their actions. Ethnographic engagement thus involved: participating in a series of meetings involving the waste management team and between the team and other local authorities, where waste strategy was discussed; collecting documents used by the waste management team; going out onto the streets with waste collectors in order to study the practices of waste collection and sorting; spending time in households studying how sense was made of recyclable and non-recyclable materials and the distribution and presentation of such items. Although in this paper we focus on strategy, this was not the only basis for members of these settings to make sense of their actions. In order to draw together the following analysis, Dan worked his way through his field materials to analyse those moments where strategy occupied a position as an important term for members and then looked to those actions that were later incorporated into strategy discussions. In this way, the following analysis emerged of strategic accounts and account-abilities.

Waste Management in Midsize City

Waste management might, at first glance, seem like a strange setting to be studying core issues in 'strategy'. Surely "rubbish" is a mundane operational issue – just a case of throwing things away – far removed from the concerns of strategic management? The account we are about to

give, based on an ethnomethodologically-informed fieldwork study of waste management strategies in the UK, is replete with many (if not all) of the 'mainstream' issues of strategy, namely:

- a complex regulatory and audit environment (e.g. recycling targets set by government, league tables, tax penalties);
- complex supply chains (e.g. public and private providers and processors of waste),
- strategic partnerships (e.g. between City and County Councils);
- fast-changing and volatile markets (e.g. shifting commodity prices for metal, glass and paper, markets for combined versus separated types of glass);
- strategic ambiguity associated with the creation of new markets (e.g. trading of landfill credits between councils).

Those charged with creating and implementing the Joint Municipal Waste Management Strategy (hereafter The Strategy) in the local council Dan studied were, arguably, dealing with an environment just as complex as any big corporation.

Before we go on to analyse some of the strategic ethno-methods we traced during the study, it is of course necessary to give some of the background 'context' to the industry. Indeed, most strategy case studies that we may use in the classroom with our students follow exactly this genre: background to the industry, strategic challenges, strategic responses to those challenges, then outcomes of those strategic responses for the firm and its stakeholders. However, as we highlighted above, 'context' is not viewed by ethnomethodology in the same way as conventional social science, both quantitative and qualitative. In rejecting the so-called "bucket" theory of context, which views context as like a container within which social action takes place, ethnomethodology instead views context as something that members actively orient to and bring into being in and through their everyday practices. Llewellyn and Burrow (2008) provide a good illustration in their study of how people buy (or decline) copies of a magazine from a homeless seller on the high street: the relevant 'context' of the interaction can be, within even a few seconds, transformed from one of a 'refusal' to a 'sale' to a 'donation' through the invocation of contextual 'features' such as having change, being in a rush, or being a religious person. Hence, in what follows, we do not follow the conventional genre of strategy case studies and simply present *our version* of "the context" or "the environment" within which the strategy was formulated. Rather, we present how members of the local council *themselves* oriented to, accounted for and 'enacted' those contexts which they viewed as relevant to their practical work of 'doing strategy'.

The study took place in 'Midsize City' (a pseudonym), a City Council in a relatively affluent city in the south of England. The researchers were warmly welcomed and viewed as a potential ally and resource: not only for bringing legitimacy, prestige and expertise to assist the development of The Strategy, but also providing 'bodies on the ground' to assist in the practical activities in a short-staffed and budget-starved department. The council were working on the development of a new 'strategic partnership' with the Country Council who disposed of the waste collected by Midsize City and three other local councils. These waste management partnerships had been more or less imposed on local and regional government by the Department of the Environment, Food and Rural Affairs (DEFRA) and would become a central feature of the strategy. The staff in charge of The Strategy – the waste management team of Rose, David and Paul (in ascending order of seniority) – held a series of meetings with the researchers in which they accounted for (by providing a kind of context-in-action) their current strategic thinking and actions.

What would later become 14 strategic policies incorporated into The Strategy, were, at this time, still sets of issues, questions, ideas and concerns that were being formulated for the purpose of making sense of the City Council actions. The strategic policies included objectives for decreasing landfill waste, increasing recycling rates, supporting and informing the local population of opportunities to recycle and reduce their waste, streamlining the management of commercial or trade waste and forming and operating a new partnership. However, at this point when the researchers entered the scene, these policies were yet to coalesce into a coherent document. At the time, the City Council were still working their way through multiple ways of constituting 'contexts' both present and future through which they could make sense of their actions.

Rose in particular spent time with Dan (the first author and one of the researchers), invoking three contexts within which the City Council's strategic action could be made to make sense. The first 'context' that Rose described was the moves by successive UK governments to push local authorities to increase rates of recycling, within the broader mantra of 'Reduce, Reuse, Recycle'[5], developed as a response to various pressures, ranging from environmental

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[5] See, for example, the green recycling guide website: http://www.reducereuserecycle.co.uk/

campaigners like Friends of the Earth to forms of European legislation[6]). Rose explained that the national government (DEFRA) had been attempting to collect figures for the weight of waste collected and disposed of or recycled by each local authority in the UK[7]. DEFRA then set targets for each local authority to increase its weight of waste recycling percentage[8] and tied this to the formation of waste management partnerships between, for example, the City Councils that collected waste and the County Councils that disposed of waste.[9]

Partnerships were told to develop their own 'strategies' to maximise recycling. Rose explained that this emphasis on weight targets was a reaction to the introduction of landfill credit trading. Partnerships were given credits to the value of their target of landfill waste weight and could either sell excess credits to other authorities, or borrow (or even be forced to buy) credits from other authorities if they could not meet their credit balance. Rose suggested Midsize City had become somewhat exasperated by the complexity of this system because authorities had trouble establishing the value of credits. Moreover, some authorities did not bother to recycle at all and instead waited to buy up cheap credits instead, as a cost cutting measure: credits turned out to be cheaper than a fully-fledged recycling system, perhaps because the only 'buyers' were those local authorities without much budget, looking to cut costs.[10] What was clear, for Rose, was that Midsize City Council had not fared well in DEFRA's data collection and ranking. Data recently released had ranked Midsize City Council 246th in a national recycling league table, making it one of the 'worst performing' authorities. It later transpired in a meeting between the City Council, County Council and the three other local authorities in the waste management partnership, that they were the worst league table performer in the partnership. Across a series of meetings, the league table became a means to criticise, justify and demand explanations for City Council current and future planned recycling strategies.

The second 'context' invoked by Rose was a more general expectation that local authorities would fit their waste management activities in with national government attempts to create a recycling mentality. For Rose this was a complex activity because government actions seemed

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[6] Including the EU Waste Framework Directive and the EU Waste Catalogue.
[7] By weighing waste collection and recycling vehicles and their contents to create a total weight of waste for an authority and then calculating the recycling percentage.
[8] This was partly said to derive from EU waste directive and targets, see:
http://ec.europa.eu/environment/waste/landfill_index.htm
[9] This was partly designed to rationalise who (between collectors and disposers) had the authority to set priorities for waste management.
[10] This market based scheme was ended in 2013 https://www.gov.uk/waste-legislation-and-regulations

to interweave two, mutually incompatible forms of activity: criminalising those households which did not manage waste appropriately[11], at the same time as running national TV advertising campaigns, using voiceovers by popular comedians attempting to 'edutain' the population into recycling.[12] Recycling, it seemed, was to be a matter of both criminality and light entertainment.

The third and final 'context' Rose explained to Dan concerned the variety of means available for collecting, managing, disposing and/or processing waste and recycling material. Midsize City Council favoured giving every household a recycling box and a leaflet on how to use it, with weekly kerbside collections. However, apparently mundane issues such as the colour, shape and materials of the box, to the lay-out of the leaflet became viewed as a potentially "strategic" issue because they might result in more recycling, enable the City Council to meet targets, achieve the objectives eventually set out in The Strategy and move up the recycling league table. Would a green box encourage more recycling and prove a strategic success? Should the leaflet be set out differently? Were kerbside collections the most appropriate way to collect recycling? Other, better performing members of the emerging partnership supplied households with larger wheelie bins for recycling. Rose puzzled over the relative strategic importance of wheelie bins or boxes.

We can see various ethnomethods at work here. The waste management team were engaged in a continual process of making sense of their work, what they perceived might be the context in which that work was taking place and how strategic action could be continuously re-oriented. This sense-making was central to establishing what 'partnership' and 'strategy' might mean, but also for foregrounding that boxes and leaflets, for example, were the relevant entities to focus on and that individual households were the appropriate unit to be held to account. Rose's invocation of the 'context' for Midsize City Council's waste management partnership strategic action was reflexive, indexical and inconcludable. Rose and Dan were reflexively tied into the production of a sensible order for waste, continually producing and responding to accounts of boxes, households, leaflets and DEFRA campaigns in their conversations. These exchanges were indexically tied to a variety of times, places, people, claims to knowledge and so on through which they were made to make sense. And the exchanges were also inconcludable;

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[11] See for example: BBC story (2004) available here: http://news.bbc.co.uk/1/hi/england/london/3571227.stm
[12] See for example national recycling adverts (available here: http://www.youtube.com/watch?v=xbQPtuh9hzs)

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there is a clear sense in which each way of answering a question – such as what should the layout for the recycling leaflet include – provides a basis for asking further questions. However, in place of an impasse in strategic action, this inconcludability became a managed feature of the occasion of having a researcher in Rose's office. Perhaps Dan could help work on a way to produce answers (make sense of) householders' waste actions?

Rose looked to Dan as a potential resource for making sense of a fourth area of strategic activity – the actions of the household. The strategy document that would eventually get written stated that Council aimed to: "help householders … to reduce and manage their waste through the provision of advice and appropriate services" (Strategic Policy 3; p. 15) and to: "encourage householders … to separate waste for recycling collection by providing targeted information and awareness raising" (Strategic Policy 8; p. 20). However, at this moment, Rose was still puzzling over what 'the household' meant to the City Council. These questions – namely, what households did with their waste and recycling, and when and where and how the City Council might engage with these actions – did not have answers at this point. The category "household" may have come with certain common-sense understandings of who or what they 'typically' are and 'typically' do, but at this point there was not yet any shared understanding of what the category meant in terms of 'being strategic' about this stakeholder and 'doing strategy' to manage them more effectively. Dan was thereby positioned as a 'strategic resource' for helping in this quest to try to know (and thereby influence) the recycling activities of these "householders".

For some time Rose had been mulling over the possibility of repeating a participation survey that Midsize City Council had carried out once before (but failed to act on, she admitted). The participation survey involved sending out researchers on the same rounds as recycling collection crews to give a score to each household recycling box according to its presence (or absence), position and contents. The aim of repeating this survey would be to collect data on approximately 10,000 household recycling boxes each week for four weeks. This might provide a key means to make sense of the household as a strategic entity: both individually (i.e. each household) and collectively (i.e. particular boroughs). Rose suggested that a re-design of the survey would avoid the previous issues of the data being overlooked. In the newly devised survey, boxes would be scored according to a five-part system:

1. Box out and containing the correct contents
2. Box contaminated (either by the wrong materials, or materials presented in the wrong way - for example Midsize City Council would collect paper, but only if it was dry or damp, not soggy)
3. Box collected (if the survey team fell behind the recycling crew)
4. Box not out (the household were not recycling)
5. Box not at kerbside/within a metre of the kerb (if the household were attempting to participate, but placing their box inappropriately)

The scoring system was key to creating an accountable system for 'making strategy'. The household and its box was to be the responsible entity in focus; its moves, position, contents (and discontents) were also to be given a number. In this sense the entity was not just to be constituted as strategically central, it was to be classified (as relatively good or bad) and ranked. The entity was thus to be constituted and made knowable as a thing which could become strategic, but it was also to become knowable in a specific way – as morally imbued, as right and wrong, as bringing into being a correct or incorrect present moment which could also become the subject for a (strategically worked upon and improved) future moment. The scoring system created the focal entity (box and household), and rendered that entity account-able (through being scored), classifiable (through a putative moral order made available through the scoring system) and available for strategic action (through producing accounts of the 'recycling status' and 'recycling potential' of households and boxes, whole streets, districts of the city and possibly if called upon the whole city).

However, an ethnomethodological account of strategic action need not end here. The action of constituting, classifying, ranking and strategizing entities continued. Dan set out with four other researchers who would each work with one of the five Midsize City Council recycling teams, scoring household recycling boxes as the recycling crews worked their way through the city streets in the early hours of the morning. There is not the space within this paper to capture the entire ethnography, but two brief vignettes will provide an insight into the ethno-methods in action:

Vignette 1: Scoring the box (excerpt from Dan's field notes Day 1)
Although [there are] only 5 numbers there is just about infinite variety in what each number can be made to do. If a box is out, it should get a 1. But if it is just behind a gate, is this a 1 or a 5 (not by kerbside)? Rose said in some places pavements are too narrow to put boxes out so they get a 1 from me, but do they get the same from [all the survey] crews? And if a box is halfway back down a drive, is this a 1 or 5? Also if a box has paper on top, and is out, it should get a 1. However, what if there are things

hidden beneath such as cardboard or plastic? Should it then be a 2 (box contaminated)? Do I have time to check each box? As decisions have to be made really quickly to stay ahead of the collection crew I try and apply my scoring relatively consistently, but this is very tricky. Not all pavements are the same width so in some streets I think residents should have made more of an effort in putting the boxes out [closer to the kerb] and so I give them a 5. Is this fair? Also it turns out some people stack cardboard next to their box – do they expect this to be collected and so should I give them a 2 [box contaminated]? Or is it rubbish [coincidentally left next to the recycling box] and should I just focus on the green box and give them a 1? This is very confusing this early in the morning.

From Vignette 1 we can note that the scoring system did not straightforwardly produce an entity, able to be ranked and in the future 'strategized'. As Bittner (1965) points out, such 'formal schema' do not provide for their contexts of interpretation. Organizational phenomenon such as 'rules' or 'structures' do not determine conduct, but rather rely on the tacit background assumptions, stocks of knowledge and reasoning procedures used by members to make them work. If one were to simply 'read off' from the recycling box scoring system that boxes were to be given a number, a universalised, consistent and easily comparable set of boxes and their households might be imagined. Instead, the up close ethnographic scrutiny of the boxes and their households and the scoring system revealed what we might term an indexical, reflexive, and in-principle inconcludable scoring system. The boxes and their households could be made to fit just about any score in the scoring system, with the application of different forms of knowledge, reasoning and assumptions about the type of household, type of street and type of box contents. However, the survey team were put under pressure by the collection crews to score quickly – a distinct form of punctualised calling to account. But scoring a box thoroughly took time (e.g. rummaging through the contents of the box, measuring width of pavements, etc.) that the collection crews could not provide. After all, they had a job to do, and could not wait around for the box-scorers.

From bringing into being an entity – the box and its household – to be ranked and morally assessed and subject to future strategizing, we found a multitude of entities, possibilities for scoring, pressure to achieve a quick score and ranking. The scoring was indexical and reflexive in that the system and individual scores were made to make sense in relation to invocations of context (knowledge of different types of household, assumptions about what was a reasonable distance from the kerb, assumptions about what recycling collection crews typically did, a need to produce a reliable result). And the scoring was in-principle inconcludable in that any box could be interrogated at length and made to appear in different entries in the ranking system.

But the scoring was not restricted to a single day – it went on. The orientation of the scoring, the constitution of entities, their entry into classifications, their moral ranking and entry into possible future strategic action were each subject to on-going change as Vignette 2 makes clear:

> **Vignette 2: Scoring the box** (Day 12)
> I am getting very quick at assessing boxes now. In a quick glance I can quite reliably constitute the correct score for the box (a couple of times I test myself by giving the box a quick score and then looking through it more thoroughly. Each time I score it the same by both methods). This quick glance scoring system, I think, is based on my expectations of the area and an approximate view of the street and what kind of street it might be, what I can see on the top of the box, where I think the box is and how much effort I think the people have put into putting the box where it is. Under this system to score a 1 is easier on some streets than others. If it is a low participation area and the box is not that close to the kerb it might still get a 1 (not a 5), but I score more harshly in high participation areas where the box must be closer to the kerb to get a 1.

Vignette 2 reveals a shift in the operation of scoring, moral classification and preparation of entities for potential future strategic action. From uncertainty in Vignette 1 (slow scoring, worrying about the reliability of the scoring system and the thoroughness through which each container should be checked, concerns regarding pressure put on the scorer by the recycling collection crew), comes a kind of certainty in Vignette 2 (quick scoring through a kind of judgement of the moral appropriateness of the effort made by households in displaying their recyclable material). In other words, Dan quickly developed a *stock of knowledge* and associated *reasoning procedures* for scoring the boxes to enable this mundane form of 'strategy work'.

Discussion: Ethnomethodological Insights into "Rubbish Strategy"

What we can note across these fieldwork vignettes is that The Strategy being pursued by the City Council can be followed across a broad variety of locations. Strategic action is not reducible to the process of producing a strategy document. Instead the City Council's strategic action brought together meetings, surveys, households' own activities, the actions of refuse collectors (known colloquially as "bin-men") and recycling crews. Furthermore, in the same manner as the meetings between Rose and Dan could be understood in terms of their reflexive, indexical and inconcludable character, the same can be noted in the scoring of recycling boxes. Dan was engaged in an on-going reflexive struggle to accomplish a sense of the scene in each street. This sense was indexically tied to pavements, boxes and their contents, the weather, the actions of the collection crews and so on. And the scoring system proved in principle

inconcludable; justifications could have been made for scoring each box in any number of ways. However, as we can see in the second vignette, this in principle inconcludability is managed by the invocation of a number of etcetera clauses (to paraphrase Garfinkel) that enabled Dan to ensure that whatever was there in the box and on the score sheet not only *will do*, but *does*. From treating each box as an almost insurmountable problem of representation (just how can positioning, content and household intent be transformed into a single number which discounts all messiness and uncertainty), Dan develops an "ethno-method" (by Day 12), which makes sense of the box not just through its contents, but its position in a particular street, the kind of street that it seems to typify, what this might tell us about the households on this street, and the level of effort members of that kind of street ought to have entered into in displaying their materials.

What happened next to The Strategy? Following the recycling survey, a further series of meetings were held between Dan and the City Council waste management team. The indexicality, reflexivity and inconcludability of the scoring system were recast in these meetings. In place of a focus on boxes and their contents, were concerns with the moral character of Midsize: which areas were recycling what amounts according to the 'accounts' produced by the recycling survey, and by implication which areas were thereby morally approved as "good recyclers". This moral character was further taken up in relation to the possibility of increasing recycling rates. For example, Paul (the most senior member of the waste management team) wanted to know, given their relative affluence – where affluence was assumed to be an indicator of the time and interest a population would have in recycling – which areas of Midsize ought to be recycling more. However, these meetings were also characterised by a continual sense of being called to account. Various 'hailing effects' (Neyland & Coopmans, 2014) – accountability relations that call for and prefigure certain kinds of response – were invoked as contexts through which the moral characteristics of Midsize City could be put to recycling work. These included suggestions that they were under pressure to up recycling rates from other members of the new waste management partnership. Rose also implied she was under pressure from her immediate superiors, in addition to a distant pressure from DEFRA/national government through which a future of yet-to-be-worked-out policies for potentially fining failing local authorities was invoked.[13] In this way, the new partnership with

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[13] Midsize City Council waste management team produced an internal document which suggested that if DEFRA were to introduce a policy of fining local authorities for failure to improve recycling rates, the fine for

the County Council and three other local authorities maintained a future looming presence within these meetings – a context which could be indexically pointed toward and which could be used to reflexively accomplish a sense within meetings, but which still remained inconcludable.

Conclusion and Future Research Agenda

Our aim in this paper has been to take up the plea by Clegg, Carter and Kornberger (2004: 27) that "strategy should be considered empirically in terms of ethnomethodology: an analysis of those things actually done by the actors themselves in situ as the doing of strategy." This plea has already been taken up, notably by Samra-Fredericks, whose work has delivered ethnomethodological insights into important phenomena such as how strategists shape strategic direction (Samra-Frdericks, 2003, 2004), how strategists generate agreement and support for their proposals through emotional displays and power moves (Samra-Fredericks, 2004a, 2005), and how strategists employ their knowledge of the moral accountability, rights and obligations associated with different categories of actors (Samra-Fredericks, 2010)[14].

We have sought to outline how the core concepts of EM can be used to study strategy work. This takes us away from the rational analytic models, proclamations and prescriptions of strategy books towards the more mundane work that enable strategic action to take place, notably the production of *accounts* of various kinds. It is through accounts that members produce the social facts that generate social order. In the case of strategy, then, accounts are what strategists use to produce the social facts they rely on to generate a sense of the future "order" that will guide the scope, direction and position of the organization. This "order" is not, as other management (and indeed sociological) theories presume, the result of external structures, norms or rules, internal cultures, habits or routines, or broader inter-organizational contests of power or clashes of interests (Rawls, 2008). Rather, strategic order is an ongoing achievement of member's ethno-methods for producing it (ibid). Thus, studying strategy ethnomethodologically means studying the often taken-for-granted practices (ethno-methods) through which strategy is made.

Midsize would increase each year to around £31m by 2020 if their recycling rates remained low – a substantial increase in council tax bill for every household.

[14] Samra-Fredericks (2010a) also lays out the potential of ethnomethodology for the strategy as practice field.

Naturally, this emphasis on the practices of strategists places EM close to the concerns of the influential movement in strategic management known as "Strategy-as-Practice" (Golsorkhi *et al.*, 2010). As Whittington (2007) states, strategy can be studied like any like any other social practice and can therefore be subject to the 'sociological eye'. In fact, as Carter, Clegg and Kornberger (2008: 108) point out, many recent 'advances' in SaP research actually comprise the 'belated recognition' of scholarship influenced by EM in particular. However, as Rawls (2008) outlines, there are some subtle but important differences in EM's view of practice compared to other practice theorists such as Schatzki (2005, 2006), Giddens (1982), Bourdieu (1972) and Latour (1987), notably by asking how analytic entities such as 'routines' or 'habits' come to be recognised as relevant and appropriate on any particular occasion by members. What these concepts, and other such analytic abstractions such as 'norms', 'values' or 'institutions', fail to account for is the constitutive work that members undertake in order to produce each and every situation as one in which it belongs or applies. Just as Dan had to make sense of which category applied in a system for scoring recycling boxes on each occasion, strategists have to make sense of exactly *which* categories, norms, rules, routines, values and institutions are relevant to each particular strategic decision-making situation. EM provides insights by revealing the (often unexplicated) *social competence* (Samra-Fredericks, 2005: 807) or *everyday skills* (Samra-Fredericks, 2010a: 231) – namely the background stock of knowledge and associated reasoning procedures – that constitutes strategic management.

This study has illustrated the relatively mundane and taken-for-granted work that goes into the production of accounts – in the form of talk-in-interaction and numbers in a survey – the very accounts that strategists rely on in 'doing strategy'. Strategy, we propose, relies upon a set of ethno-methods used to produce accounts that provide the 'facts' through which strategic decisions and actions are made. In this case, conversations about possible future scenarios and numbers from a recycling survey were brought together to accomplish a range of strategic decisions and actions about a new venture (in this case a strategic partnership), investment and divestment (in this case decisions about what forms of recycling technologies to invest in, or indeed, whether simply to buy 'credits' instead), and the organizational environment (in this case current and future government policy).

The 'rational' analytic models and tools of strategic management – PESTEL and SWOT analysis, 5 Forces, Boston matrix, and so on – have yet to address the more fundamental question of how the 'facts' and 'forces' listed in such models get made. Ethnomethodology

addresses precisely this question by asking: how do social facts get made? For instance, how is the business environment, such as a 'political' factor like future government regulation of an industry, made sense of? How is a 'customer' or 'stakeholder' or 'competitor' understood? In the short vignettes given here, we have seen the ethno-methods used to accomplish a sense of what various 'stakeholders' are (Government departments, individual households): how they might behave, what they want, and how they could be managed. We have seen how the production of numerical accounts in the form of recycling surveys produced a sense of 'the environment' for the purposes of making strategic decisions about changes to the Council's recycling strategy. The production of numerical accounts in the form of recycling league tables and recycling credit trading also produced new realities, creating a sense of 'competition' where none had existed before. This emphasis on sense-making builds important links between ethnomethodology and theories of sensemaking inspired by the work of Karl Weick (see Brown's (2015) contribution to this special issue), including influential work within Strategy as Practice on the role of sensemaking and sensegiving in strategic change (see e.g. Johnson, Melin & Whittington, 2003; Rouleau, 2005; Rouleau & Balogun, 2011)[15].

For ethnomethodology, then, the social facts used to do 'strategy' are not pre-existing external constraining forces that exert their influence on members, but rather are the endogenous product of the ethno-methods of members themselves (Button, 1991). These ethno-methods are the accounts (linguistic and numerical, verbal and nonverbal) that members use to describe and explain the world they encounter – Government, customers, competitors, partners, stakeholders, and the like. *Accounting*, for EM, is the process of describing and explaining the world through the production, distribution and use of reflexive, indexical and inconcludable accounts. The point of studying these accounts is not to evaluate their adequacy or veracity, whether they are 'right' or not – a notion sometimes called 'ethnomethodological indifference'. As Mel Pollner cautioned: "don't argue with the members" (Gubrium & Holstein, 2011). Rather, the aim is to study how these accounts are created (i.e. what ethno-methods are used to

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[15] However, some important distinctions also exist here that differentiate EM's approach to sense-making: most notably the emphasis on sense-making as a social activity rather than an individual cognitive process. This emphasis on inter-subjectivity makes notions of sense*making* as separate to sense*giving* untenable – our sense is publicly visible in our actions and therefore always "gives" or "displays" this sense to others, thereby influencing their next action. Joining a queue is a simple example – the sense that a person makes ("this looks like a queue") is also displayed to others by positioning one's body in the line. EM also places emphasis on taken for granted and often unexplicated "common sense" that normally goes unnoticed. Arguably, Weickian studies of sensemaking have tended to study *breakdowns*, *failures* or *disruptions* in routine sensemaking (e.g. Mann Gulch, Tenerife air disaster, etc.), not the *routine* sensemaking that makes ordinary organizational life pass unnoticed.

produce them), and what practical outcomes these accounts are used to accomplish. In the case of the criminal justice system, for instance, various (linguistic, scientific and numerical) accounts are produced by witnesses, defendants, police officers, lawyers and forensic experts to accomplish judgements about conviction or acquittal (Sudnow, 1965; Cicourel, 1968; Meehan, 1986; Pollner, 1987; Lynch, 1998). In the case of strategic management, then, EM seeks to study the various (linguistic, scientific and numerical) accounts which are produced by a range of actors to accomplish judgements about the long-term scope, direction and position of the organization.

Strategists may not have the same training in social theory as professional social scientists but they are nonetheless engaged in "practical sociological reasoning" (Garfinkel, 1967: 1). This has close resonance with Sandberg and Tsoukas's (2011) argument that practice-based theories need to engage with the "practical rationality" used by practitioners themselves. And, moreover, this practical sociological reasoning is not 'optional', nor is it reserved for only certain occasions. Strategists have no choice because they need to continuously apply their "practical reasoning procedures for the reproduction of social orders" (Samra-Fredericks, 2005: 806) in order to accomplish the 'order' that is the strategic decisions about the organizations they manage. Moreover, the application of this strategic reasoning has consequences far and wide, affecting society as a whole not just the organization and its members, such as the environmental consequences arising from the recycling systems we have studied here. For this reason, it is imperative that future research directs its attention to the methods and reasoning procedures that are used to constitute strategy.

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