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RESEARCH PAPERS

Taking Stock on How We Research the Third Sector: Diversity, Pluralism, and Openness

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Abstract With the growth of third sector research, the field needs more dedicated discussion on how we study the third sector, not only the decisions in research design or data collection process but also the general research approaches and the way we analyze the data. In this introduction to the special issue of Voluntas Volume I, we discuss how the sector can foster a more inclusive and diverse research community for people, topics, and methods. We also discuss the implications of methodological pluralism, an organizing principle of a research community that fosters respect, appreciation, and empathy between its members. We conclude by calling for more empathetic, transparent, and accountable research.

Keywords Research methods · Diversity · Pluralism · Transparency · Quantitative methods · Qualitative methods

Introduction

Reflecting the increasing size of the third sector worldwide, the volume of studies focused on the third sector has grown in recent decades (Ma & Konrath, 2018). Research into the third sector has been broad and interdisciplinary, covering everything from the most general characteristics and conditions of populations served to the nuances of organizational growth, composition, and survival (Ma & Konrath, 2018; Nirello & Prouteau, 2018). It has been studied through the prisms of history, social work, sociology, law, business, political science, and public administration, among others. Considering the interdisciplinarity nature of our field, the methodological toolbox of researchers investigating third sector issues is diverse in terms of epistemologies, academic traditions, fundamental assumptions, methods, and applications. Salamon, Haddock, and Toepler (2022) note that definitions and methods are important because they affect the sector's relationships with policy, administrative processes, and the state. The authors say that: "what is measured can impact filing and reporting requirements, and these changes open opportunities for the sector to improve its experience in this regard" (pg. XX). Since concepts and measurements matter, we must recognize that there are different ways in which we can gather information and knowledge about the sector. By recognizing and respecting this plurality of views about what aspects of the sector merit study and interest, we can collectively push our field further, build better theories, and establish a distinct academic identity rooted in diversity. However, despite the inherent diversity of approaches utilized in the field, the conversations often focus solely on research findings, not the decisions in research design or data collection processes leading to those results. How do we know what we know about the third sector? Are there special considerations in studying it that researchers should be aware of?

There is a general "tumult" over greater transparency in research (Beugelsdijk et al., 2020; Pratt et al., 2020) coming from peer reviewers, editors, funding agencies, institutional review boards, students, organizational partners, and other stakeholders who participate in the research endeavor. With these increased demands for greater

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transparency and greater research accountability, scholars have been asked to justify their methodologies and approaches. Which standards determine "good" research and how transparency can be requested has been controversial among researchers and the object of sustained debates (see Jacobs et al., 2021). Even with this pressure, few published articles discussed the actual process of researching the third sector. Given the growth of research about the sector, the main outlets for third sector research tend to focus on empirical findings and their implications rather than discussions about the choices made during the research processes, with few exceptions, such as Litofcenko et al. (2020). As scholars in the field, we noted that too many conversations around us were focused on lamenting reviewers' poor understanding of research approaches and seemingly "unreasonable" demands for further revisions. This widespread frustration seemed to stem from a deep disconnect between the various types of research being carried out and the ability of reviewers to evaluate research fairly and coherently in alignment with the authors' epistemologies.

To engage in a broad discussion, we issued an open call for abstracts for this special issue to ensure that we reached scholars beyond our networks. We hoped that at least some would be interested in discussing their methodologies, approaches, and implications for research in the third sector. What we did not anticipate was a huge interest in the field. We received a record-breaking 131 abstracts for consideration, and in the end, 37 manuscripts survived the rigorous peer review process to create a two-part special issue. For the first time in the journal's history, two full volumes would be dedicated to discussing third sector research methodologies and epistemologies. Two things became apparent during the open call. First, there is a profound need and interest in engaging in research process-oriented discussions within our intellectual communities and beyond. Second, there is a definite gap regarding outlets interested in publishing articles that discuss research processes rather than results. We were humbled by the overwhelming interest in such discussions and honored to see that Lester Salamon, a pioneer in third sector research, had submitted a piece for consideration. His untimely death in August 2021 makes this article with colleagues Haddock, and Toepler, one of the last ones he published. His contributions to the intellectual and conceptual history of the field have long reminded us of how important definitions, conceptualization, and data collection are to understanding our sector. We see this special issue (Volume 1 and Volume 2) as a continuation of the work and questions he carefully laid out during his career.

In the current introduction for *Volume I*, we argue that for a vibrant and vigorous research agenda to emerge, we must foster an inclusive and diverse research community for people, topics, and methods. By critically evaluating and reconsidering our fundamental assumptions about the research enterprise, we can recognize the richness and necessity of alternative approaches to our own. We discuss how histories and records must be understood within their context and how scholars relying on historical methods must consider the limits of the evidence they rely upon. Second, we discuss the implications of methodological pluralism on third sector research. We argue that it is through methodological pluralism that our field can represent diverse types of scholars and scholarship. This pluralistic approach can advance issues of justice, equity, diversity, representation, and reconciliation in our field and our research, thus impacting the people and organizations we study. Third, we discuss the role of researchers in the sector, in other words, how they engage with the sector as they research the field. By thinking about the fundamental tension between participatory and observational methods of inquiry, this volume proposes ethical boundaries to guide our analyses and interpretation.

Why a Methods Special Issue?

What is so different about researching the third sector that warrants multiple volumes? We would argue that, at the core of studying the third sector, there is a series of relationships involving society's most vulnerable populations. Regardless of whether they explore the relationships between donors and recipients of services, target populations and advocates raising awareness, or the state's growing reliance upon nonprofit organizations to deliver social welfare, third sector researchers navigate between the study of organizations and people coalescing around shared missions and goals. Whether researchers acknowledge it or not, the sector's organizations and activities are deeply rooted in a normative enterprise: make the world a better place according to specific values. The study of third sector activities and its people pushes researchers to think carefully about those values, the impact of their study on their subjects, and how they engage with the research processes.

There are four main goals to accomplish with the two volumes of this special issue. First, the volumes illustrate the diversity of approaches in the growing field of third sector research. Second, the volumes will serve as a comprehensive repository of short, methodologically focused pieces for scholars and students to cite and further their understanding of the nonprofit sector. Third, both volumes will provide a critical lens for analysis when engaging with the sector, asking scholars to reflect on the implications of their research on the organizations, processes, and people they study. Lastly, we hope to develop a core research community interested in furthering the idea of methodological pluralism for the study of our sector.

Volume I of this two-part special issue takes stock of popular research strategies and approaches in the third sector research discussed in each of the contributions in this first special issue. Andersson (2021), McConville and Cordery (2021), and Salamon et al. (2022) all ask how we measure and conceptualize organizations in the third sector. Freeman and Williams-Puffer (2021), Onyx (2021), and Tello-Rozas et al. (2021) consider what third sector research can gain from revisiting the past and questioning assumptions about how we conduct research. Miller-Stevens et al. (2021) explore how we operationalize indicators to meaningfully capture an organization's impact, while Dodge et al. (2021) weigh the question of how we value pluralism in our research. Volume II of this special issue will reflect on the *great digital turn* of research in the field and how issues of equity and justice highlight the promises and perils of new approaches to research. With two volumes of this special issue, third sector researchers can learn to better understand studies by using these newer approaches and could integrate them into their future projects. Both issues will also address the limitations and gaps in our practices, techniques, and methods of studying the sector.

Diversity of People, Organizations, and Methods

Medin et al. (2017) examine three dimensions of (non-)diversity in the social, educational, and behavioral sciences: "(1) who gets studied (sample non-diversity), (2) the theory and methods used (methodological non-diversity), and (3) who directs and controls the research (researcher non-diversity)" (p. 1). They argue that various factors affect this observed non-diversity, including practical considerations of time, resources, perceptions of validity in the sciences, and the timescale of publications necessary for career progression, among other things (Medin et al., 2017). These non-diversity dimensions help us understand how third sector researchers respond explicitly or implicitly to the biases and constraints surrounding our research practices.

Who Gets Studied?

The gathering and interpretation of historical records have been fundamental in studying the sector's development, relationship with the state, involvement in social issues, and welfare provision. From Tocqueville's discussion of civil society's role in the US to tales recounting the life of Andrew Carnegie and the establishment of the first philanthropic foundation, these histories appear to accept the dominant narratives of their time unconditionally. These dominant narratives are often depicted in dichotomous terms: benefactors and beneficiaries. They automatically associate the notion of victimhood with marginalized communities, thus promoting a colonial worldview of the third sector where the ideals, sensitivities, and cultural norms of white-led organizations dictate how welfare and development must occur and social progress must be achieved.

In their attempts to study the past, modern historians must grapple with the inclusion or omission of alternative historical records and critically question the available evidence to understand whether they are simply perpetuating dominant narratives of white-led philanthropic organizations. As Freeman and Williams-Pulfer (2021) note, predominant historical narratives of philanthropy are centered around the experiences of white-led nonprofit organizations and the accomplishments of white philanthropists while ignoring the deep colonial roots of charitable work (Morey, 2021). These narratives, at best, ignore perspectives from communities of color and marginalized communities in general; at worst, they erase and minimize alternative conceptions of philanthropic and charitable work. Works revisiting and challenging established narratives have also highlighted the challenges of tracing back histories when conventional archives are incomplete or nonexistent. Freeman and Williams-Pulfer (2021) show how the creation and maintenance, or neglect and destruction of archives, is highly political and enshrined in colonial and racist legacies.

What are historical records? In informal or marginalized contexts, as is often the case in third sector-related work, written or visual records are either incomplete or absent, in part because such recordkeeping is not always a priority in certain activities, may not be appropriate in some cultural contexts, and may not even be desirable in places such as political or military conflict zones. This is why studying and building our understanding of the third sector on a foundation of life-history narratives, as suggested by (Tello-Rozas et al., 2021), can not only help us move away from a purely organizational study of the sector, i.e., focusing on the organizations and their ecosystems but also stirs us toward adopting more agent-centered approaches hinging on the lived experiences of stakeholders, activists, executives, beneficiaries and other relevant stakeholders. Whether these are individual life narratives or collective ones (Onyx, 2021; Tello-Rozas et al., 2021), the insights gained from the people of the sector guide us toward a deeper understanding of the impact and failures of various third sector activities (see Kingston et al., 2021). Furthermore, we have new possibilities to understand the possible motivations, beliefs, and worldviews of those engaged in philanthropic activities by expanding our notions of what constitutes historical records. For scholars interested in understanding why events occur (or, for that matter, why they do not occur) and how social changes happen over time, the inclusion of both life narrative and collective memory work is vital. Historical records are more than written, audio, or visual archives; they are the social facts that shape the people within the third sector and their work for the communities they serve.

Methodological Pluralism in Third Sector Research

As we know, the research endeavor can be a deeply political process. Even at the most basic, fundamental levels of research, the political environment will impact how many—if not most—researchers consider various factors when deciding how to proceed with their work. Revisiting the past and diversifying the tools and approaches we use to make our analyses can open new and interesting venues for research and insights.

Four factors shape research decisions: (1) assumptions, (2) practical considerations, (3) habits, and (4) disciplinary considerations. First, assumptions about how knowledge is collected and processed and even what constitutes evidence will inevitably lead to scholars viewing the same social issues differently. Does this imply one approach is "more" valid than another? Not necessarily, but it requires some academic honesty and openness to appreciate that there are multiple ways to study the third sector. Second, practical considerations constantly shape research. For instance, the amount of funding a researcher has or the ability to travel are considerations that will constrain our choices and influence our decisions. Third, researchers are often creatures of habit, whether by preference or necessity. We develop expertise in a narrow set of methodological tools and deploy them in different contexts. While efficient, this approach can lead researchers to miss important dimensions of the phenomena they study. It is akin to having a hammer and looking everywhere for nails to hit when a screwdriver might be more suitable if you are not encountering nails but screws. This mono-research focus can create blind spots and academic insularity. Fourth and perhaps most importantly, our disciplinary traditions and training will predispose us toward specific research paths. This is not a problem if one develops the ability to appreciate and learn from research completely different than our own. Suppose we adopt methodological pluralism as an organizing principle of our field of study. In that case, this will require that members of this epistemic community recognize, respect, and value the diversity of methodological approaches. By fostering plurality, that is, the co-existence of many different methodological approaches in third sector research and within our publication outlets, we can hope to develop strong theoretical advances and positive practical implications for those we study (see Dodge et al., 2021; Searing & Berkovich, 2021).

Whether we use archives, interviews, texts, life narratives, or any other source of knowledge, there is a vast constellation of research strategies and techniques that warrants careful examination to understand better, refine, and appreciate the contributions to our knowledge. Methodological pluralism in publishing venues and professional associations is key to more generalized diversity, equity, and participation from historically marginalized and racialized members within the profession. It suggests that a promising path is to promote the work of diverse scholars because approaches that are critical, qualitative, and deeply questioning of the status quo tend to align, albeit not always, with researchers' identities and lived experiences. Diversifying by including more critical approaches could move the field toward inclusion and reconciliation between researchers and the studied phenomena, thus going beyond simple demographic exercises in diversity.

Who Directs the Research? Engaging with Third Sector Research

Given the field's propensity to engage directly with the communities we study, a healthy abundance of participatory methods is being used. Perhaps the most notable and popular is the ethnographic approach. Ethnographic work, or what some have called the science of "deep hanging out" (Clifford, 1997), has deep roots in anthropology (Beaton, 2021). It is fortunate that much diversity already exists within this range of approaches that rely on regularly engaging with communities participating in the social phenomenon under study. Starting from whether researchers actively immerse themselves within the study or are merely passive observers, the use of a deep immersion provides opportunities when avoiding its main pitfalls. Hagan (this issue) in this issue reminds us of how the ethical issues within ethnographic work affect both participants and observers. This is particularly the case in the sphere of voluntarism, where boundaries between context, informed consent, data credibility, notions of self-care, personal risk, and the level of healthy emotional involvement must be taken into consideration for both the work and the analysis (Hagan, 2021, see table 1). Despite these important pitfalls, ethnographic work in third sector research is well suited to build an understanding of how context affects the practice and ideas behind voluntarism; moreover, it also allows alternative conceptions to emerge and enrich our theorization of the field (Chadwick et al., 2021).

Given how third sector scholarship typically pays attention to marginalized populations and the social issues affecting them, embracing ethnographic approaches helps us refocus the field's priorities toward those we study and their daily realities. Not all ethnographies need a physical immersion in the context. Fulton and Baggetta (2021) show that a more positivist approach to ethnographic work can yield important insights. By studying and collecting observational data from 99 convenings of three civil society organizations in Indianapolis, they provide a more detailed and nuanced account of the internal dynamics of convenings while increasing the number of case studies. The middle-range approach they suggest, systematic social observation (SSO), builds on the ethnographic method and offers a venue to integrate some of the deep nuances allowed by ethnographic work. However, regardless of the type of ethnographic work being done, as Beaton (2021) reminds us, researchers must recognize the increasing plurality and diversity of approaches necessary to study the third sector and thus embrace alternative norms of rigor and "good research." Researchers can also value a participant-led agenda, for example, thus empowering participants to co-construct the research (see Ramsay et al., 2022). While there has been sustained attention paid to the study of marginalized populations, it is important to acknowledge the great emphasis on the study of the powerful elites and donors, which can also shed light on the power dynamics at play and the donor-recipient relationship (see Breeze, 2021).

Creativity, Openness, and Risk-Taking

All the articles within this two-volume special issue focused on researching the third sector illustrate how vibrant and innovative the field already is, and it should strive to continue in the same trajectory. Many articles across these two special volumes offer valuable lessons in intellectual openness and honesty by revisiting some well-known methodological approaches and tools. For instance, Cheng and Choi (2021) note that the endogeneity problem will limit third sector scholars in establishing the causal link between the sector's activities and its broader impact. Indeed, in asking ambitious questions, we also need ambitious methods and basic literacy for approaches we are less familiar with. We echo their call for greater creativity and transparency in addressing difficult problems within the main publication outlets in our field. We must avoid the narrowing of questions and findings. This requires a collective reflection on the research we publish, the types of intellectual risks we reward, and how our publication outlets and reviewers can promote a broader diversity of research, techniques, and approaches. Given the methodological advancement in other fields, as illustrated by Cheng and Choi (2021) regarding the endogeneity problem linked to the societal impact of the sector, third sector scholars and reviewers alike must expand their research practices, adapt to new solutions, and tackle hard problems head-on. Beyond authors, editors and reviewers must also respond by rewarding innovative approaches in their publication decisions. In a special issue on critical nonprofit studies that Coule et al. (2022) co-edited, they also stress the importance of finding appropriate reviewers with the skills and knowledge to evaluate the quality of critical work submitted.

Innovation and diversity are not easy feats of research. They require a deep understanding and awareness of the existing research and an ability to identify critical gaps in our knowledge. To assist in these endeavors, a systematic literature review (SLR) can be extremely helpful (see Gazley, 2021; Schnable et al., 2021). They allow us to compare and contrast studies and the consistency of their findings while showcasing trends and patterns within that thematic area. These systematic assessments should be valued as a means to reflect on the progress made thus far and an important contribution to methodological debates. By comparing research designs, variables, and results, SLR goes beyond compiling findings and evaluates how research is done. With new advances in artificial intelligence, we can now process an even larger number of articles and revisit previously established conclusions. Few systematic analyses had been done specifically on the methods used in third sector research, the level of analysis preferred, or demographic and gendered patterns of publication. These studies are needed yet onerous on the researchers as the information is not always readily available or may be subjective and, therefore, unreliable.[1] The publication of SLRs should be valued as distinct scholarly contributions—not just as benign literature reviews.

However, it is important to remember that the systematicity of such reviews should be understood within a particular framework of dominant research. The literature reviewed has been published in the outlets under examination, thus erasing other types of scholarly work and researchers that have not been so privileged. Our increasing partiality for articles within the systematic reviews, often a product of practical considerations such as timeliness, availability, and institutional access, can lead to researchers ignoring important research conveyed in longer formats, particularly books and monographs. The penchant toward comparative research also puts at an advantage concepts and findings that can be measured and quantified—anything that cannot be rendered down into numerical values is

[1] For example, the perceived gender of an author based on a name, or a picture can lead to strong assumptions on presenting identity.

therefore at risk of being ignored. Lastly, the hegemony of English as the *lingua franca* of research,[2] or at least metric-recognized research, can distort our knowledge and findings and ignore important advances made outside the "Anglosphere" (Vucetic, 2011). Our understanding of issues is often filtered through an Anglo-western-based prism, thus favoring the reproduction of some conceptual legacies rooted in colonialism, racism, and patriarchy. In the case of this special issue, despite having an open call and circulating through our international networks, scholars from the Anglosphere (US, Canada, UK, Australia, and New Zealand) and particularly those in US-based institutions seem overrepresented in both special issues. These are just a few reasons why accepting the limits of our methods and related findings allow for the flourishing of a pluralistic and diverse research field.

Looking Ahead: A Call for an Empathetic and Accountable Research

We hope these two comprehensive special volumes will open new discussion venues and call for greater empathy among scholars, reviewers, and editors. An empathetic, open, and pluralistic approach to research pushes scholars to see the world through the methodological lenses and premises of others while recognizing that quality research may look completely different from ours. By being explicit and transparent about our rationales, approaches, decisions, purposes, and biases, we can overcome methodological and disciplinary silos. This will require a fundamental rethinking of our publishing processes, such as word limits, access to research data, and primary source material. However, this march toward greater transparency must adopt a pluralistic approach that respects and values differences in methods rather than imposing standards deemed more "scientific" by some members of our diverse research community and thus appropriate for all. Because our field is deeply committed to the relationship between theory and practice and tends to engage with active and ongoing social issues, intentional discussions around methodologies must become more prevalent to promote pluralism, intellectual openness and honesty, and diversity within our research, publications, and our ranks.

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Author Contributions Authors are listed alphabetically and have contributed equally to the preparation of this manuscript.

Declarations

Conflict of interest The authors have no competing interests to declare that are relevant to the content of this article.

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[2] Thank you to the anonymous reviewer who rightfully pointed out such limit.

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