

Personal Documents as Data Sources for Social Sciences. A Review of History of Uses, Ethical, Methodological and Epistemological Considerations

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ABSTRACT

This article envisages critically present the use of the personal documents, looking from a historical perspective at how it was practiced in different paradigms in the humanistic-social sciences. The exposé also considers the methodological and the ethical implications of using the method, underlining, in this respect, the aspects related to the preservation and reuse of the materials of this kind. By putting into balance the trumps and downsides of the personal documents method, the article highlights, in fact, the importance of using the personal documents method in studying a wide range of specific problems of the humanistic-social sciences. The ultimate purpose of the article is, therefore, that of prompting the social scientists to look more carefully and more trustingly at the alternative of choosing the personal documents method, as a potential powerful tool for sociological research, providing them, at the same time, with possible directions in discerning between the favourable and unfavourable situations for using it.

Argument

Direct ways of penetrating their authors' subjective universe, the personal documents, under their older or newer forms – life stories writings or oral histories, autobiographies or memories, diaries, logs, classic or electronic letters, but also personal drawings, photos or audio/video recordings and others – they represented and continue to represent data sources for the

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scholars preoccupied by exploring and probing the individuals' own manner of positioning themselves in relation to the challenges of the social life.

This article envisages critically present the use of the personal documents, looking from a historical perspective at how it was practiced in different paradigms in the humanistic-social sciences. The exposé also considers the methodological and the ethical implications of using the method, underlining, in this respect, the aspects related to the preservation and reuse of the materials of this kind.

The first part of the article is dedicated to *the 'Polish Peasant' Era*, the golden age of the personal documents method. After going through the factors which initially contributed to directing the social scientist towards this kind of documents, a vast presentation is made of the critical, theoretical and methodological reactions of the time, upon the publication of *The Polish Peasant*, as well as of the impact the issue of this work had on the method evolution.

The second part of the article concerns highlighting a second important moment in the history of the personal document use, that of reassessing the method scientificity, as it is reflected in the comparative critical analysis made by Herbert Blumer.

The third part presents the epistemological reasons of the new wave of the sociological using of personal documents, dealing with various aspects of the matter, from the implications of focusing on individual and on the individual determinants to those of the social scientist's oscillating between the humanism and the postmodernism.

The fourth part contains ethical and methodological considerations on the use of the personal documents in the humanistic-social sciences, the focus being placed on the modalities of storing and preserving them, as well as on the possibilities of reanalysing these data.

The article ends with a concluding part which, by putting into balance the trumps and downsides of the personal documents method, highlights, in fact, the importance of using the personal documents method in studying a wide range of specific problems of the humanistic-social sciences. The ultimate purpose of the article is, therefore, that of prompting the social scientists to look more carefully and more trustingly at the alternative of

choosing the personal documents method, as a potential powerful tool for sociological research, providing them, at the same time, with possible directions in discerning between the favourable and unfavourable situations for using it.

The paper contributes to existing literature by putting together main references to using personal documents, in a critical perspective. I also insist on the ethical considerations. The paper adds a contextualization of the uses of the method. In my view, the use of diaries in sociological literature depends on one hand on the more general societal dynamics. On the other hand, it is influenced by broader trends in sociology and social sciences, and on availability of digitalized personal documents, and computer tools to analyse them. Consequently, I anticipate an already visible tendency to reassess the importance of this source to retrieve information in order to empirically validate sociological explanations. This is particularly relevant for marginal, unusual, hard-to-reach groups and hidden minorities. Increasing digitalization might, in the future, make personal documents relevant for other analytical purposes as well.

The Polish Peasant Era

Important sources of data for the reality qualitative research, which were successfully used both in sociology, and in (social, oral) history, anthropology, political science, psychology, psychiatry, medicine, and others, the personal documents offer us valuable information about people in the concrete social context of their existence. One of the definitions of the personal documents, used on a very often basis, despite or maybe due to its slightly evasive character, generating a wider freedom of movement for the researchers, is the one launched by Robert Redfield:

‘A human or personal document is one in which the human and personal characteristics of somebody who is in some sense the author of the document find expression, so that through its means the reader of the document comes to know the author and his or her views of events with which the document is concerned’ (Redfield 1942a: vii).

The definition sounded more than promising for any researcher in the humanistic-social sciences, who was interested in probing the depths of the individual and in how they would reflect the behaviour, attitudes and emotions the individual nurtures in and in relation to the social life.

The orientation towards this kind of social documents will begin to be shaped at the end of the 19th century, when the question ‘What goes on in people’s minds?’ (Redfield 1942b: VII) started to preoccupy more and more not only the psychologists, but also the social scientists. The moment of glory of the valuation of the personal documents as materials specific for the social sciences would however be recorded in the ‘20s,’30s of the following century, within the researches of symbolic interactionism orientation, proper to the American Chicago School of Sociology.

The most important work in the social sciences, founded on the method of the personal documents, remains *The Polish Peasant in Europe and America* (1918/1921), prepared by William I. Thomas, American sociologist, exponent of the Chicago School, together with Florian Znaniecki, Polish phenomenologist philosopher ‘but wary of the transcendental idealism of Husserl, and interested in pragmatism, so well represented by the Chicago School’ (Czarniawska 2007: 74). The qualitative researcher of Polish origin, Barbara Czarniawska, particularly known for her constructivist preoccupations in the field of the organisation theory and anthropology, wrote, in her recent and very interesting work, *Shadowing and other Techniques for doing Fieldwork in Modern Societies*, about the time when and circumstances under which the auspicious meeting between W. Thomas and F. Znaniecki took place. She thus reminded us how, being interested in the problem of Europeans immigrating into the U.S.A., W. Thomas would make a visit to Poland in 1913, where he met F. Znaniecki for the first time, at that time, Director, of the Society for the Protection of Emigrants. The close and fruitful collaboration which followed thus gave birth the first ample study in the humanistic-social sciences focusing on the ‘critical use’ of the personal documents - private letters, life stories, diaries, newspaper materials, official documents and reports from social agencies, social work agencies or from Courts:

‘... 754 letters from Poland acquired through an advertisement in a Chicago Polish-language journal, paying 10 to 20 cents for each one;

8,000 documents from Polish parishes in Chicago, from immigrant organizations, and from the fields of charitable and legal aid associations; as well as diaries of Polish immigrants (for which they paid the authors).' (Czarniawska 2007: 76).

In the presentation he made for dividing the use of the personal documents into periods, Gordon Allport used the syntagms 'critical use'/'uncritical use' in the work mentioned hereinabove (Allport 1942). Mainly focusing on the areas of psychology and social psychology, Allport spoke about two distinct periods.

The first one was that of the uncritical use, including the studies having in common, on the one hand, 'their directness and enthusiasm of approach', and on the other hand, 'their prevailing lack of concern with technical perplexities' (Allport 1942: 17). A more central place among the uncritical studies was to be occupied by the famous religion psychology work by William James, *The Varieties of Religious Experience* (1902), which 'put his developing presuppositions of radical empiricism to test by drawing upon the self-reported religious experiences of thoroughly religious people describing their most acutely religious moments' (Allport 1942: 6). Still within the uncritical period, Allport also framed the studies by Hall (1904), Freud, Beers (1928 [1907]), Healy and Bronner, Murchison (1930, 1932, 1936) or those within the pages of *The Psychological Clinic* magazine, founded by Lightner Witmer in 1907, which were sometimes based on the use of the personal documents, but never methodologically commented. G. Stanley Hall considered that the knowledge of the teen-age should be obtained through diaries and autobiographies (Hall 1904). Sigmund Freud saw the personal documents as 'a natural outgrowth of a clinical situation in which the patient is always encouraged to speak for himself' and he would use them deductively 'as exemplifications of theories previously formed' (Allport 1942: 9, 10). Clifford Beers prepared an autobiographical paper, written shortly after recovering from a manic-depressive breakdown, which would be considered to be 'a simon-pure personal document' and which would open the way towards the 'narration of personal suffering' (Beers 1928 [1907]). William Healy and Augusta Bronner insisted on including the 'child's own story' in the written-reports of the delinquency cases, thus also proving a certain methodological self-consciousness, placing them at the

borderline between the critical and uncritical use of the social documents. Finally, Murchison puts forward a history of psychology in autobiographies (Murchison 1930/1932/1936).

The issue of these studies, Allport thought, was triggered by the transformations which had taken place at scientific level at the end of the 19th century, by going from the era of the dogmatic phenomenology to the experimental one, and then from embracing the concepts of 'variety', 'range', 'distribution' and 'clinical type' immediately to the use of the personal documents as the main data source:

'Thus the origins of the personal document in psychological science may be said to lie primarily in (1) the tradition of phenomenology and introspection which produced the great foundation stones of mental science; (2) in the growing influence of biological positivism that required the use of subjects (other organisms) for study and (3) in the discovery and featuring of individual differences in the late nineteenth century.' (Allport 1942: 4-5).

The second period Allport highlighted is that of the critical use of the personal document, including the studies focusing also on the analysis of the methodological questions raised by the use of the human documents. The demarcation line between these two periods, according to Allport, is represented by the publication of the research of Thomas and Znaniecki, *The Polish Peasant*. The novelty of the no less than 2,200 pages, comprised within the five volumes of the work, would be the existence of a consistent methodological note, where W. Thomas (particularly preoccupied by 'attitudes') and F. Znaniecki (preoccupied by 'values') presented in detail the reason by virtue of which the human documents (the term used by Thomas and Znaniecki, equivalent to that of 'personal documents') constituted the main data source for their researches. Furthermore, the same note also warned us about the fact that, although focused on the matter of migration, more precisely, of the expatriation and of the consequences thereof at cultural level, the study was far more complex than that, also touching a series of social theory problems: the problem of individualisation; the problem of efficiency; the problem of abnormality - crime, vagabondage, prostitution, alcoholism; the problem of the occupation; the problem of the relation between sexes; the problem of social happiness (Allport 1942: 78-84).

Finally, mention should also be made of the fact that all these problems would be looked at from the angle of the interdependence between the elements that Thomas and Znaniecki considered being the fundamentals of the social life: the attitudes, as manifestations of the conscious life, and the values representing the sphere of the reference community experience.

Regardless of whether we share, or do not share Thomas and Znaniecki's manner of interconnecting the attitudes and values in the interpretation of the operating mechanism of the social life, Ken Plummer, the follower of a 'critical humanism', considered that the position of equilibrium they adopted towards two of the classical controversial relations of sociology - individual/social and objective/subjective continues to be highly important:

'[...] unlike Durkheim's famous dictum to treat social facts as things, Thomas and Znaniecki advocated a position in which both individual and social factors must always be taken into account in any social study. Their dictum, now largely forgotten, states that "the cause of a social or individual phenomenon is never another social or individual phenomenon alone, but always a combination of a social and an individual phenomenon" (Thomas and Znaniecki, vol. 1, 1958: 44).' (Plummer 2001: 105).

In the spirit of the symbolic interactionism, which dominated the American sociology of the '20s and '30s, Thomas and Znaniecki would grant the individual subject a central place, beside the social factor, in explaining the social life, which had been unimaginable before that in the positivist or realistic approaches in the social sciences. Moreover, in explaining the social life, the subjective interpretations the individual provides for the various situations of life would weigh, at least, as much as the objective factors, as W. I. Thomas would suggestively express it, several years after the publication of *The Polish Peasant*, in the so-called theorem which would thereafter bear his name: 'If men define situations as real, they are real in their consequences' (see Thomas 1928: 571-572). Under these conditions, setting forth a methodology appropriate for surprising the individuals' subjective interpretations became imperiously necessary for understanding the social life. Thomas and Znaniecki would answer this methodological need by adopting an unhackneyed manner of approaching the social life,

based, on the one hand, on collecting and analysing the spontaneous or provoked human documents, and, on the other hand, by inter-correlating them with pre-existing theoretical elements. For Thomas and Znaniecki, the human documents by means of which the subjects tell their lives, granting various meanings to the events they go through or that they witness more or less directly, were the ideal data source in the social sciences, and the social scientist's resorting to a different type of data would exclusively be due to a practical reason concerning the difficulty of obtaining a high enough a number of documents providing an exhaustive coverage of the sociological problems (Thomas and Znaniecki 1919: 6-7).

The methodological challenge proposed by *The Polish Peasant* triggered a wave of reactions at the time, some of which were positive (particularly those of the followers of the symbolic interactionism), some other negative (especially those of the contesters of the symbolic interactionism - positivists or realists - and not only). The remarkable existence and magnitude of these reactions, regardless of their nature or orientation, ultimately show the major impact the methodology of the personal documents had on the American scientific community in the interwar period. In 1938, the Social Science Research Council decided to institute a committee whose task was to include, as well, analysing and evaluating the most representative researches in the humanistic-social sciences, amongst which was also *The Polish Peasant*. The Executive Committee of Social Science Research Council assigned the task of critically analysing this work to the interactionist sociologist Herbert Blumer.

Although obviously attached to the Chicago School of Sociology where he was trained as a sociologist, Herbert Blumer would submit Thomas and Znaniecki's work to a rigorous objective criticism, the human documents thus being evaluated depending on four criteria considered by Blumer as defining for any scientific instrument: the representativeness of the data; the adequacy of the data for the purpose for which they are employed; the reliability of the data; and the validity of the interpretation. Following the evaluation, Blumer ascertained that the main instrument in *The Polish Peasant*, the human documents, taken individually, do not pass the scientificity test, failing every one of the four established criteria. Another major reserve Blumer has is the one related to the inadequacy of human

documents in testing interpretations. The specific experiences cannot represent means of validating or invalidating theories, but serving, at the most, for clarifying the nature of the interpretation (Blumer 1979 [1939]: 80). Although the data of the human documents clarify and support the theoretical statements, to a certain extent, and, reciprocally, the theoretical statements shed a somewhat clarifying light on the data, the relationship between the theory and the inductive material remains however, in Blumer's opinion, ambiguous-which would be vehemently and explicitly challenged by G. W. Allport four years later:

‘This process of interaction between theory and inductive material which Blumer finds ambiguous is the essence of the methodological problem of personal documents’ (Allport 1942: 21).

Not least of all, Blumer imputes on the interpretations of the human documents, on the one hand, the dependence to the investigator's competence, and on the other hand, the dependence to the theoretical framework from whose perspective the data are analysed.

Nevertheless, Blumer would grant Thomas and Zaniecki the mitigating circumstance of being only at the beginning, so, in the conclusion of his report in 1939, he would list no less than eight contributions that *The Polish Peasant* had in consolidating a new methodology in sociology and in the social psychology. Amongst them, the most important ones are the highlight on the need to study the subjective factors in the social life and proposing a new research technique, capable of capturing them: the human documents (Blumer 1979 [1939]: 52).

The critical evaluation H. Blumer did of *The Polish Peasant* did not remain echoless amidst the scientific community so, soon after, on December 10, 1938, the Executive Committee of Social Science Research Council would organise a conference in an attempt to deepen and clarify the methodological problems highlighted by Blumer, in relation to the use of the human documents. However, not even following the S.S.R.C. conference, would the methodological status of the personal documents be clarified, the Executive Committee considering it necessary to subsequently put together four more assessments, through this allowing the main humanistic-social sciences - sociology, history, psychology and anthropology - to express their

specific points of view concerning this issue. Two new important critical reports thus emerged. On the one hand, there is the one by G. W. Allport (quoted hereinabove), prepared mainly from the psychological perspective, but containing, as well, a significant part related to ‘the general use, forms and values of the life history approach’ (Plummer 2001: 111) and a fine critical analysis of the evaluation done by H. Blumer. On the other hand, there is the second report, which would comprise the studies prepared by Louis Gottschalk (from the historical perspective), Clyde Kluckhohn (from the anthropological perspective) and Robert C. Angell (from the sociological perspective) (Plummer 2001: 111-112). Although neither did these latter reports elucidate the methodological dilemmas concerning the use of the personal documents in the humanistic-social sciences, the increasing interest shown to this theme subsequently to the publication of *The Polish Peasant* proved, in the end, the remarkable importance the American sociology granted it during that period. In this sense, Ken Plummer stated that the Chicago School is the one that institutionally and intellectually awarded legitimacy to the documentary approach, insuring the academic acknowledgement thereof, even if only for a sort while (Plummer 2001: 113-115). The apparently firm and bold step the Chicago School took in welcoming the qualitative methodology of the personal documents would be however blocked, from the mid-1930’s onwards, by the rising of the ‘more scientific’ approaches of Lazarsfeld’s empirism and Parsons’s realism. Concerned with detecting operating laws of the social life, the positivists would search for firm, objective and, therefore, quantifiable and generalizable data, and not the subjective interpretations of the reality that the human documents could have offered. On the other hand, the Parsonians would be interested in collecting theoretically well-founded data and not such which ‘cannot embody «objective truth» and are mere surface scratchings’, as are the ones included in the personal documents (Plummer 2001: 113-115). As a result, the supremacy of the Parsonian theories in the ‘40s-‘50s, but also the proliferation, during the ‘60s, of the statistic methods (the investigation, the opinion poll) and of the software, which allowed the processing of a very high amount of quantitative data in a relatively short amount of time (Gobo 2005: 10) were, at that time, the main enemies against the development of this method.

Allport would frame, in the same period of the critical use of the personal documents, triggered by Thomas and Znaniecki's work, critically analysing them, at the same time, yet a few more studies having a pronounced methodological character which he considers as being representative for the humanistic-social sciences in the '20s-'30s. These are, therefore, the studies by: Ernest T. Krueger, who would attempt to test the utility and validity of using the autobiographical documents as scientific research data (see Allport 1942: 22-24 and Krueger 1925); Samuel Andrew Stouffer, remarkable American sociologist belonging to the Chicago School, who, concerned with the validity and reliability of the personal documents, would reach the conclusion that the autobiographies lead to the same results as the questionnaires, the latter being, nevertheless much easier to use (see Allport 1942: 24-25 and Stouffer 1930); John Dollard, employee of the Social Science Research Council, who would critically analyse the life-history method, according to the standards of the culturalist and Freudian perspective he adhered to (see Allport 1942: 25-30 and Dollard 1935); Frenkel-Brunswik and Maller, raising for discussion the problem of self-deception that the authors of the personal documents may fall prey to, and which must be detected and ignored in the analysis, and, to the extent possible, prevented by building appropriate research tools (see Allport 1942: 30-32, and more in Frenkel-Brunswik 1939 and Maller 1930); Cartwright and French, dealing with the problem of the reliability of life-history studies (see Allport 1942: 32-33 and more in Cartwright and French 1939); Reckless and Selling, and Cartwright and French, proposing as a means to improve the interpretation validity, the technique of the conference attended by independent judges (see Allport 1942: 33-34 and more in Reckless and Selling 1937); Polansky who, by means of a modern experimental approach, speaks, on the one hand, about the perspectives a life-history can be looked at - the structural one, cultural one, genetic one, that of the typical events, that of the individual differences and, finally, that of the inadaptability - and, on the other, about their predictive power (see Allport 1942: 34-35 and more in Polansky 1941); and, finally, A. L. Baldwin's study, relating the statistics with the unique case, in the novel attempt 'to quantify the structure of the personality of *one individual* life on the basis of a collection of personal documents' (see Allport 1942: 35-36 and more in Baldwin 1940).

Reassessing the scientificity of the human documents - Herbert Blumer

In 1979, forty years after the publication of Blumer's famous critical analysis on *The Polish Peasant* and still as many years as of the organisation of the S.S.R.C. Conference on the same topic, Herbert Blumer would perform a succinct re-evaluation of the most important methodological aspects of his previous critique, which would be published in the introduction to a volume (Blumer 1979: v-xxxviii), reediting his report, the transcript of the Conference Proceedings, as well as comments on Blumer's classical analysis by Thomas and Znaniecki. Herbert Blumer would reconsider, on this occasion, the following three fundamental methodological questions that Thomas and Znaniecki had answered affirmatively to in *The Polish Peasant*:

'(1) is it true that genuine sociological analysis of human group life has to include subjective factors; (2) if so, are 'human documents' a necessary or appropriate instrument for catching subjective factors; and (3) if human documents are a required research instrument do they meet the criteria of a 'scientific' instrument' (Blumer, 1979: xiii).

As concerns the place of the subjective factors in the sociological analysis, Blumer would this time contest the 'behaviouristic' position, according to which, the scientific research should only be based on 'objective' data, as well as that of the followers of the macro-sociology, according to which, the sociologist should limit oneself at studying the objective relations between societal factors. He would the same way also contest the idea, widely spread in the '70s, according to which the essence of the human society would not be represented by the human action (as considered Thomas and Znaniecki), but rather the social culture and structure, as preceding and triggering factors of the social action. He would however admit that Thomas and Znaniecki are right as to the fact that the individuals always act in social situations, their behaviour being fundamentally influenced by the respective social circumstances incorporating, as seen herein above, both subjective factors (the attitudes), and objective ones (the values).

Moreover, as regards the second methodological issue raised again for discussion by Herbert Blumer, namely, the capacity of the human documents to capture the subjective factors, so necessary to the analysis of the human society (particularly of the social change), Blumer and the authors of *The Polish Peasant* seem to be, this time, in agreement. The key-concept by means of which Blumer would justify the use of the personal documents in order to 'hot' detect the subjective experience would be that of 'naturalistic' study. The logic of the 'naturalistic' study is a simple one: to each 'naturalistic' purpose/objective a specific methodology would have to correspond, capable of detecting, collecting and analysing data of 'naturalistic' nature, speaking about the subjective experiences of the social actors or, in other words, about 'how the actors approach their situations, see their situations, define their situations, and lay out lines of action in their situations' (Blumer 1979: xxviii). And where better could we obtain such subjective sort of data from, if not from the subjects themselves, 'in the form of accounts of their experience' – letters, life histories, recordings of conversations between those involved in a line of action, remarks of an actor as remembered by others, diaries, confessions, responses to interrogating, accounts from actors – that is, from what Thomas and Znaniecki called 'human documents' (Blumer 1979: xxviii)? Thus, through the introduced thematic and the manner of approach (detecting the social phenomena in their natural development - expatriation, the clash between the cultural patterns or the so-called 'social becoming'), but also through the used methodology (the use of naturalistic human documents - life histories and letters), *The Polish Peasant* proved to be a genuine 'naturalistic' study. Therefore, Blumer's answer to this question is definitely affirmative: yes, the human documents did represent an appropriate research tool for determining the subjective factors in the case of Thomas and Znaniecki's study, which, as a matter of fact, is valid for any other naturalistic study aiming at catching the subjective experiences of the social actors (individuals, groups, communities).

Finally, the third methodological question Blumer reassessed – the scientificity of the human documents as research tools – is also the one he had most vehemently challenged in the evaluation of *The Polish Peasant* in 1938, thus demolishing its scientific credibility. Forty years later, Blumer

would look at the application of the four criteria for validating the scientific tools in the case of the human documents from a different perspective, that of the flexibility and adaptability.

As regards the *representativeness*, Blumer would consider that, in the case of naturalistic studies, based on human documents, what is much more important than selecting, from a given population, a scientifically representative sample, but most of the times, irrelevant for the thematics of the research, is choosing appropriate subjects, namely those who have knowledge of the studied social phenomena:

‘a half-dozen individuals with such knowledge constitute a far better “representative sample” than a thousand individuals who may be involved in the action that is being formed but who are not knowledgeable about that formation’ (Blumer 1979: xxxiii).

In the same register, Blumer would draw the attention to the distinction which must be made between the *adequacy* of the conventional research instruments and that of the human documents. If, in the first case, the adequacy involves aiming at identifying and measuring, as precisely as possible, the variables taken in the study, in the case of the researches based on human documents – researches exploratory in nature, requiring the use of an inductive methodology – the purpose aimed at will not be, as much, recognising pre-established variables, as highlighting new aspects or dimensions, achievable by repeatedly re-examining the documents undergoing study, and also by including additional human documents in the analysis (Blumer 1979: xxxiii-xxxiv).

Therefore, Blumer would this time plead to acknowledging the adequacy of the data originating in the human documents to the purpose of the exploratory researches.

Moreover, as regards the third criterion of the scientificity, *the reliability*, Blumer would state, as he had also done, to a certain extent in 1938, that although the data originating in every individual human document, taken separately, proved to be more than once consciously or unconsciously truncated and/or distorted by the social actor enrolled in the study, they can still constitute reliable, trustworthy sources for the scientific research, when they are looked at globally, next to the data originating in other human documents, found included in the research batch and

supporting, completing and verifying each other and supportable, complementary and verifiable through each other. In other words, we could say that the human documents used in a scientific research must be looked at as the pieces of a puzzle. The puzzle, small or big, depending on the complexity of the social reality under-going study, will only be reliable when all the necessary pieces are gathered and put in their respective places.

Beyond these aspects, Blumer raises again the problem of the reliability of the human documents in the unhackneyed, but yet unexplained terms of the relation between *reliability* and *truth*. What to do with the accounts which 'rang true', but which are actually only fictions – of the subjects or even of the researchers?

'If the scholarly value of the human accounts depends on how accurately they depict the kinds of human experiences being studied, what difference does it make whether the accounts are fictitious or actual happenings. [...] The problem seems to be less a matter of the honesty of the informant and more a matter of accurate perceptiveness.' (Blumer 1979: xxxv).

Finally, concerning the fourth criterion, *the testability*, confronting us with the question 'How can get human documents to yield firm and decisive data?', Blumer would come, this time, with a new point of view. For obtaining valid data – firm and decisive – Blumer would advise us, firstly, to find and convince the knowledgeable informants (subjects) to enrol in the research for what regards the type of action under study and, secondly, to submit the thus collected human documents to the thorough examination by a restricted group consisting, as well, of individuals knowing, in depth, the studied problems. Nowadays, in the specialised literature, to these two ways of obtaining the validity of the personal documents, a third one is added, concretely aiming at the validity of the interpretations, consisting of analysing the research results right by a part of the subjects involved therein.

Therefore, one can say that the publication of *The Polish Peasant* on the scientific stage, despite the continuous contestations/claims, represented, for decades on end, a crucial moment, a turning point in the social sciences, opening the way towards new methodological approaches of the social life, which were to place the human subject at their core, with his/her subjective manner of looking at and understanding the world we live in.

The new wave of the sociological use of personal documents. Between humanism and postmodernism

The period between the publication of *The Polish Peasant* by Thomas and Znaniecki (1920) and the publication of *The Use of Personal Documents in Psychological Science* by G. W. Allport (1942) represented, in fact, the golden era of the (critical) use of the personal documents in the humanistic-social sciences, through the fact that it was legitimated by the American Chicago School of Sociology (Plummer 2001: 113-115). Being permanently between the devil and the deep blue sea, between the positivist methodological rigorousness and the theoretical scrupulousness of the realism and rationalism, the humanist sensitivity and flexibility of the naturalistic studies based on the personal documents failed, beyond the interwar period, to be an interest focal point for the social sciences. Nor could it have been, reckoned Ken Plummer, otherwise, a big supporter of the life stories, from the perspective of a critical humanism:

‘ (...) whilst we can continue to see the Chicago School as providing the major social entrée to the personal document approach, we may also have to start recognizing at the start of the twenty-first century, that its approach was important but in the end untenably naive. It started to make the bridge to pragmatic, experientialized, localized knowledges, but it could not, and did not, go far enough.’ (Plummer 2001: 115).

After more than decades when the boom of the statistic methods and of the idea of the supremacy of the society (of the social structure) over the individual forestalled the entire attention of the social scientists, the concern for the auto/biographical, which without going out, had been shyly smouldering during all this time, timorously but definitely returns to the stage of the scientific community, freshly (and with new points of view).

In this context, the '70s will represent the beginning of the offensive of the new wave of sociological works using personal documents (especially, life stories). One of the exponents of the new wave, Daniel Bertaux, the editor of the well-known study reader, *Biography and Society. The Life History Approach in the Social Sciences* (1981), drew the attention on the changes in

optics and on the thematic diversity that the sociological studies can be characterised by, after the '70s. Therefore, if the studies prepared in the '20s and '30s, in the framework and following the tradition of the American Chicago School of Sociology, all used the same particular theoretical framework – the 'symbolic interactionism' – generally focusing on the problematics of the deviancy (except for the Polish researches, which not only systematically continued after the fifth decade, as well, but also approached a very varied range of themes), the sociological studies of the new wave would deal with a multitude of social problems and processes, on very diverse theoretical frameworks symbolic interactionism, Sartrian Marxism, structuralist Marxism, cultural anthropology, historical social psychology and historical sociology, psycho-history, role theory, interpretative sociology and so on (see Bertaux 1981: 5-6).

It was still at this time that the presence of the not entirely new idea of that 'homo narrans' (in contrast with the Descartes's rational man) started being felt, the idea of the individual with particularities and relations, behind whom there is also a story of his own, which might or might not be related to other similar stories, in the attempt to better understand the mechanisms of the universe we live in.

One could also witness the penetration, in the humanistic-social sciences, of ideas and themes specific for the postmodern thinking, which some sociologists see as being in an unnatural and probably, partially, involuntary connection (continuity?) with the naturalistic approaches of the Chicago School followers, or, in other words, with the humanist or symbolic interactionism ideas and themes. Ken Plummer (2001) would largely debate on the matter of this alleged connection, confronting different points of view (Shalin 1993; Maines 1996; Stones 1996; Denzin 1989, 1991, 1992, 1995, 1996, 1997), wherefrom it results that the two approaches cross paths, to a certain extent, in what regards the rejection of the subject-object dualism, of the generalisations and abstractions, or of the excessive dependence on the positivism-scientism, as well as in supporting a plurality of perspectives, of the marginal, contextual, local, everyday, heterogeneous and indeterminate. Nevertheless, a part of the postmodernism and post-structuralism theoreticians (Claude Levi-Strauss, Michel Foucault, Aimé Césaire, Jean Baudrillard, Jean-Francois Lyotard, and others), mostly belonging to the

French School of Sociology, would visibly distance themselves from what had established itself as a model – the modern humanism model! – for the American social scientists of the Chicago School, the apple of discord being largely precisely the conception everyone had of the ‘human being’. If the former, as seen hereinabove, placed ‘the human being’ at the core of the humanist-social researches, the latter would usually give precedence to the social structure in explaining the social life, considering the human being as being an epistemological disaster, an ‘idealism of the essence’ (Althusser 1969: 228) and a ‘myth of bourgeois ideology’ (Althusser 1976: 52-53), and going as far as totally rejecting ‘the human subject’ from this explanation: ‘the final goal of human sciences is not to constitute man, but to dissolve him’ (Levi-Strauss 1966, *apud* Plummer 2001: 5). For the supporters of these ideas, also found under the name of ‘sceptical postmodernists’, the personal documents could no longer represent a useful research tool for the social sciences.

Ken Plummer was of the opinion that this controversy originated in the differences of approach between the humanities and sciences and consequently, as Nisbet (1976: 16) pointed out in his study *Sociology as an Art Form*, in the fact that the social sciences established themselves following the model of sciences rather than that of the humanities. Here is a succinct, but very suggestive characterisation of the essential differences between the two approaches:

‘It is the chasm between looking inside, exploring, feeling and imagining, or recording externals, measuring, generalizing and theorizing. The images are starkly opposed: one “falls in love”, and other “observes love”.’ (Plummer, 2001: 8).

Less radical than the ‘sceptical postmodernism’, the ‘affirmative postmodernism’ calls the return of the subject as a person and a renewed recognition of the subject in society, which implies the repositioning rather than the recycling of the modern subject (Rosenau 1992: 57-61). Although the social structure and context generally continued to represent, for the ‘affirmative postmodernists’, important elements, the accent would fall this time on the diversity caused by the differences between the individuals and on the need for self-expression and self-achievement (Scott Lash, John Urry, Ulrich Beck, Bob Jessop, Daniel Bell, and others). Plummer also pointed out

a few anti-humanist authors who got, in arguing their ideas, to make some compromises as concerns the humanist ideas: Edward Said, Aimé Césaire, Lila Abu-Lughod, Cornell West, Jeffrey Weeks, Martha Nussbaum, Seyla Benhabib, Nancy Fraser, Anthony Giddens, Zygmunt Bauman, Agnes Heller, Jürgen Habermas, Mikhail Bakhtin. Edward Said, for instance, spoke of a different type of humanism 'shorn of all its unpleasantly triumphalist weight' (Said 1992: 230, in Plummer 2001: 260); Aimé Césaire (1972) only contested the 'pseudo-humanism', that recent western version, and not the humanism itself, as a principle; Lila Abu-Lughod (1978) proposed the 'tactical humanism', as the best version possible. Plummer proposed himself a unifying, reconciling vision, which he would name 'pragmatic critical humanism'. Going beyond the excessively simplified vision of a 'unitary' human being, that many of the critics fell prey to, but that not even the humanists themselves agreed with anymore, he would plea for an 'embedded, dialogic, contingent, embodied, universal self with a moral and political character' (Plummer 2001: 262). For many of these moderated postmodern approaches, focused on the person and self-expression, the personal documents can constitute a valid methodological instrument.

The personal documents in public space: preserving and reusing

Nowadays, eleven years after the invitation Ken Plummer made to the social scientists, regardless of their orientation, to look trustingly at the documents of life, it can be said that the interest in the use of the personal documents is increasing, apparently, in accordance with the boom recorded lately by the qualitative sociology, in general, and by the problematics of the qualitative data archiving and secondary analysing, in particular (Cucu-Oancea 2010). Besides the increasingly numerous recent studies, which use the different forms of personal documents as a main or simply auxiliary tool for data collection (Carless and Douglas 2012; Down 2012; Törrönen and Maunu 2011; Worth 2009; Monrouxe 2009; Milligan, Bingley and Gatrell 2005; Hislop *et al.* 2005; Bangoli 2004), another conclusive piece of evidence of the real concern of the humanistic-social sciences for this special type of social documents is also the existence of usually private non-profit associations and foundations, which are more and more visible on the international

scientific scene, and whose purpose is to collect, preserve and make available to whom it may concern, researchers and not only, various personal documents – autobiographies, letters, memoirs, private diaries, and others – spontaneous or provoked, originating from ordinary people, willing to confide their thoughts, feelings, events, in a word, their life to scholars, science and, somewhat, to posterity. Amongst them, mention can be made of: in the U.K., *The Mass Observation Archive*,¹ originating in the social research organisation, Mass Observation, founded in 1937; in Germany, *Deutsches Tagebucharchiv*,² founded in 1998; in Italy, *Archivio Diaristico Nazionale*,³ founded in 1984; in France, *Association pour l'Autobiographie*,⁴ founded in 1992; in Switzerland, *Association pour la conservation des Archives de la vie ordinaire*,⁵ founded in 2003; in Canada-Québec, *Archives Passe-Mémoire*,⁶ founded in 2010. An ample list of this special kind of archiving associations can be found on the website created by Philippe Lejeune, *Autopacte*.⁷ Considering the scientific impact it had, mention could be made that the most prolific and visible amongst such initiatives are, for the time being, *The Mass Observation Archive* (MOA) - for the English-speaking community - and *Association pour l'Autobiographie* (APA) - for the French-speaking one.

MOA, a Charitable Trust in the care of the University of Sussex (UK), whose main stated purpose is to create and preserve 'a resource of qualitative longitudinal social data with an emphasis on subjectivity and self-representation which will contribute to our understanding of everyday life in the late 20th and early 21st century' (MO website), comprises a wide range of personal documents, spontaneous and solicited, such as: personal diaries, personal letters, annotated scrapbooks, photograph albums, directive replies and others, collected both in the early period (1937 - mid-1950's) and the current project, *Mass Observation Project* (1981 onwards). What differentiates MOA from other archives of this sort is not only the record age of 75 years, but also the predilection for collecting personal

¹ <http://www.massobs.org.uk/index.htm>

² <http://www.tagebucharchiv.de>

³ <http://archiviodiari.wineuropa.net/file>

⁴ <http://association.sitapa.org/accueil.php>

⁵ <http://www.archivesdelavieordinaire.ch>

⁶ <http://www.archivespassememoire.org>

⁷ http://www.autopacte.org/Archives_europ%E9ennes.html

documents, provoked by the MOA through the so-called ‘directives’ - open-ended questionnaires on a variety of subjects including personal issues. Usually issued three times per year, the directives are collected from a national panel of volunteer writers, consisting of approximately 500 active members all over the United Kingdom (in time, over 4500 people participated in this panel). Without pretending to hold the statistical representativeness – in the classical sense of the term – MOA is a qualitative database, useful not only for the historians, but also for the social scientists interested in the qualitative study of the different aspects in the everyday life of the British in the past 75 years. Thus, the MOA initiative was and continues to be nowadays, as well, a subject of debate in the British academic world, and not only (Hinton 2013; Hubble 2006; Koa Wing 2005; Sheridan 1993, 2000; Sheridan, Street and Bloome 2000; Jeffrey 1999 [1979]). Moreover, the database the MOA holds has been used in humanist-social research, representing the source of many recent studies, amongst which the following could be mentioned: Bytheway 2011; Kramer 2011; Smart 2011; Hinton 2010; Kynaston 2009; Murray 2008; Savage 2007; Laughey 2006; Kushner 2004.

The second notable initiative is that of the *Association pour l'Autobiographie* (APA), founded in France, in 1992, by Phillipe Lejeune and Chantal Chaveyriat-Dumolin, ‘with the aim of bringing together those with an interest in writing or reading autobiographies or private diaries’ (Lejeune 2009: 39). If the MOA was conceived as a social research organisation, as of its very beginning in 1937, apparently under the influence of the Chicago School of Sociology and of the interwar momentum of the micro-sociology, the APA was firstly intended to be a volunteering reading group, with no scientific pretensions, with no research structure and, therefore, with no imposed themes or deadlines. Practically born from the concern for the uncertain finality of the personal documents of ordinary people, the APA undertook the task of reading, analysing and archiving (cataloguing, indexing, and then preserving) every piece of material entrusted thereto by the ordinary people all over France, but not also the task of publishing them. Moreover, the APA is based on the principle of reading ‘in sympathy’, which means the orientation towards and, therefore, highlighting the interesting and attractive aspects of the texts, which, on the one hand, gives

satisfaction to their authors, and on the other hand, informs the potential readers about their contents and style (Lejeune 2011: [12]). Currently, the APA hosts five such reading groups, consisting of a maximum of ten members and located in different areas of France. In its twenty years of operation, the APA has gathered over 2,500 autobiographical texts, out of which two thirds are narratives (autobiographies), 10% diaries and 5% letters (Lejeune 2011: [13]). What is worth mentioning is that the APA policy stipulates that the copyrights over the texts remains entirely in the submitting authors' possession, unlike the MOA, where the materials (diaries, letters, photos, directives replies, and others), once entrusted with the archives, become the exclusive property thereof. Although it was not created on scientific considerations, in the strict sense of the word, the APA is open to the public at large, interested in reading and studying the autobiographical materials, being however willing to draw the interest of the humanists and social scientists, as well. Phillippe Lejeune pointed out, in one of his latest articles, dedicated to the activity of the APA, the fact that, unfortunately, the archives are not visited by more than ten, twelve researchers per year, mostly historians (and only by two sociologists in the past two years!). Why do the sociologists keep away from this data source? 'Probably because they prefer to collect their own quantitative data through surveys conducted according to their own hypotheses and methods' or perhaps because 'they are not patient enough to go through our heterogeneous sources or to deconstruct the strategies of texts that were not written for them' (Lejeune 2011: [27]). Unlike the MOA, which is present both in the British and international scientific life through publications and organised events (conferences, workshops, debates), and in the public life through the numerous presences in the mass media, the APA seems to have a somewhat smaller scientific impact, particularly in the sociological field, despite, on the one hand, the seminars, round tables and meetings organised on an annual basis within the APA, and on the other hand, the three own periodical publications, *Cahiers de l'APA*, *La Faute à Rousseau* and *Le Garde-mémoire*, or the works based on the personal documents in the APA archives (Lejeune 1993; Lejeune and Bogaert 2003; Rebreyend 2008), true, in lower numbers compared to the ones provoked by the MOA. A proof of the fact that the APA has however asserted itself, especially in the French-speaking

scientific community, are the collaborations the APA has with other similar European organisations (*Archivio Diaristico Nazionale*, *Deutsches Tagebucharchiv*, *Red de Archivos e Investigadores de la Escritura Popular*), the creation of some of them being connected to the very existence of the APA (*Association pour la conservation des Archives de la vie ordinaire*, *Archives Passe-Mémoire*, *APA-Belgique*).

The current concern for the scientific study of the personal documents is however not particular only to the European area - be it English-speaking, or French-speaking. In 1999, the First International Auto/Biography Conference was organised at Peking University, attended by delegates from Africa, Asia, Australasia, Europe and North America. That was when, upon the initiative of Zhao Baisheng, a Chinese theorist of autobiography, Professor of Comparative World Literature and, currently, Director of the World Auto/Biography Center at Peking University, the *International Auto/Biography Association* (IABA)⁸ was created, an interdisciplinary forum whose purpose is to broaden the world vision of auto/biographers, scholars and readers, to deepen the cross-cultural understanding of self, identity and experience, and to carry on global dialogues on life writing (IABA website). Currently, the IABA comprises approximately one thousand members all over the world, literates, historians, psychologists, anthropologists, sociologists, journalists, artists or ordinary people interested in life-writing studies, who, by subscribing to the IABA listserv are kept informed about the international scientific and editorial events related to the life writings. The interaction between the IABA members is not however limited to the presence on the same correspondence list, and they can meet either by attending the biennial conferences of IABA (now at its 8th edition) and IABA Europe (now at its second edition), or by publishing in the four leading international journals in the field of biography and autobiography, recommended by the IABA site: *Biography*, *a/b: Auto/Biography Studies*, *Life Writing*, *Auto/Biography Yearbook*. In spite of the manifest openness of the IABA towards inter-disciplinarity, this time as well, the sociologists are in minority both in the pages of the mentioned magazines, and in the IABA conference halls.

What holds the sociologists away from the personal document

⁸ <http://www.theiaba.org>

archives might be the still insufficient development of a culture favourable for the qualitative data secondary analysis, amongst the drawbacks of this practice mentioning: the de-contextualisation; most of the times, the impossibility of ‘returning on the field’, of contacting the author for further consolidation or clarifications; the failure to digitise, except for a very small proportion, the personal documents existing in the archives, which renders the researchers’ access to the respective databases difficult; the difficulty in selecting the materials from the archives, which usually implies, despite the existence of thematic indexes and of the authors’ identification sheets, going through the multitude of texts, even if only superficially; the difficulty in processing the selected materials, caused by the large volume of data to be processed, coded, etc.; the imposition of constraints on the archive users, as a result of the implementation of confidentiality policies; the possible distortion of data, following the process of anonymisation, required in archiving.

Another explanation for the reduced use of the qualitative data archives by the sociologists, coming to complement the first, would be that the sociologists are not yet willing enough to go beyond the prejudice of the lack of scientificity of the qualitative research, in general, and of the study of the personal documents, in particular. The anguish of the impossibility of obtaining a statistically representative sample is most likely stronger than the temptation to try the alternative version-the theoretical sampling; the mistrust in the subjects’ ability and even willingness to be their own life’s analysts wins over the opportunity provided by the personal documents to penetrate the subjective universe of their authors; the inability to create an independent and objective tool to measure the subjects’ confessions places the trump of the multiple perspectives into a shade (data triangulation); the uncertainty of catching the phenomena aimed at, as well as the uncertainty of the interpretations due to the difficulty in testing them, discourages the action of undertaking a more flexible attitude in the matter of the validity, focused on the subjects’ involvement (wherever possible), or that of other persons, knowing the studied phenomenon well, in the processes of processing and interpreting the personal documents (investigator triangulation); finally, the concern regarding the very limited possibility of generalising these results is, probably the winner when

confronted to the judging the purpose and the proposed objectives - aspect, otherwise, fundamental in choosing one methodology or the other.

Conclusion - realities and perspectives

The critiques aside, the personal documents will represent valid data sources whenever the social scientist must study hard-to-reach groups (gay/queer, interlopes, substance users, religious sects, secrete associations, penitentiaries, convents, past groups/associations, and others) or activities (activities related to the private life, from sexual relations to the relations with the Divinity, the abusive behaviour, the organisational behaviour, and others); or when the research implies catching, as precisely as possible, eventually longitudinally, the manner how the subjects interpret and react at concrete events, at the time or as soon as possible after the time of their occurrence (professional successes or failures; personal or social drams - disease, death, divorce, criminal acts; festive events - birth, baptism, anniversaries, weddings, celebrations; new circumstances - changing the place of work, changing the marital status, the family status, changing the residential environment, etc.).

Thus, in accordance with the research objectives, the personal document scan be successfully used, either as a main data source, or as a secondary or additional source, in almost all the study fields of the humanistic-social sciences; so far, they have been used preponderantly in fields such as: social differences and inequality (Lewis 1961; Thompson and Newby 2005); sexual, racial, ethnic and religious minorities; family (Larson and Almeida 1999; Gillies and Rosalind 2005); age and gender (Letherby and Zdrodowski 1995); education and identities (Bagnoli 2004; Moinian 2006); economic systems and the organization of work (Czarniawska 1997, 1998, 2002; Lewis and Massey 2004); belief systems; health research (Elliott 1997; Jones 2000; Jacelon and Imperio 2005; Boserman 2009); delinquency and counter-culture (Zimmerman and Wieder 1977; Morison *et al.* 2003); political systems (Schiebel 2011; Dirk 2011); technologies (Brown, Sellen and O'Hara 2000; Carter and Mankoff 2005; Czerwinski, Horwitz and Wilhite 2004; Palen and Salzman 2002).

The drawbacks of using the method of the personal documents could

therefore be overcome so long as the social scientists take several aspects into account, starting precisely from raising the awareness on these drawbacks and continuing with methods to counter them: the appropriateness of the personal documents to the type of approach, the research purpose and objectives, while having the ability to attempt performing a theoretical triangulation, depending on the available resources (Denzin 1978); the establishment of the status the personal documents would have in the study – the unique, main, complementary or secondary method of data collection (taking into consideration, as appropriate, the performance of the ‘*within*’ method triangulation – the concomitant use of several techniques specific for the method of the personal documents: letters, private journals, autobiographies, photographs, private video recordings, life-stories – or ‘*between*’ method triangulation – the use of methods additional to the personal documents: the participative observation, focus-groups, interview or questionnaire investigations); selecting the subjects depending on their level of knowledge and involvement in the matters subject to the research (attempting to obtain, to the extent possible, a data triangulation, by collecting them from complementary sources, as applicable, resorting also to the qualitative data archives); including or detecting as much information as possible related to the context of the production of the personal documents, as well as in order to identify the potential environmental factors which might influence the shared data (time, space, persons), using, depending on the circumstances, the environmental triangulation (Guion, Diehl and McDonald 2011 [2002]); establishing, with a view to the data processing and interpretation, a team consisting preferably of researchers having different theoretical and methodological orientations, that the subjects can join, usually playing a consultative role (investigator triangulation).

Drawing the attention on the need to raise the awareness and balancing the advantages and drawbacks of the use of the personal documents in the humanistic-social sciences, increasing the level of trust in the qualitative data secondary analysis and in the use of the archives hosting them, by raising all of these issues for debate (Corti 2011; Valles Martínez 2011; Valles Martínez *et al.* 2011; Schubotz, Melaugh and McLoughlin 2011; Smioski 2011; Bishop 2007; Mason 2007; Van den Berg 2005; Thomson *et al.*

2005), will not remain echoless amidst the scientific community. Under such conditions, would the sociologist's getting closer to such data appear as a natural consequence, which would only leave one step to be made from here to institutionally legitimating the methods of the personal documents, which has not been made/achieved ever since the Chicago School of Sociology. If and when this step will be made, this remains to be seen.

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