Qualitative Research Design:
A Collection of Articles from *Research Design Review* Published in 2017

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Research Design Review – www.researchdesignreview.com– is a blog first published in November 2009. RDR currently includes 180 articles concerning quantitative and qualitative research design issues. As in recent years, the articles published in 2017 generally revolved around qualitative research, addressing the many concerns in qualitative research design and ways to help the researcher achieve quality outcomes throughout the research process. This paper presents the 20 RDR articles that were published in 2017. These articles cover a wide variety of design issues: seven articles pertaining to quality and quality frameworks, including the Total Quality Framework from Applied Qualitative Research Design (Roller & Lavrakas, 2015); three articles concerning qualitative data gathering; four articles about qualitative data transcripts and analysis; an article on qualitative reporting; three articles pertaining to specific methods – ethnography and content analysis; and two articles on mixed methods research.

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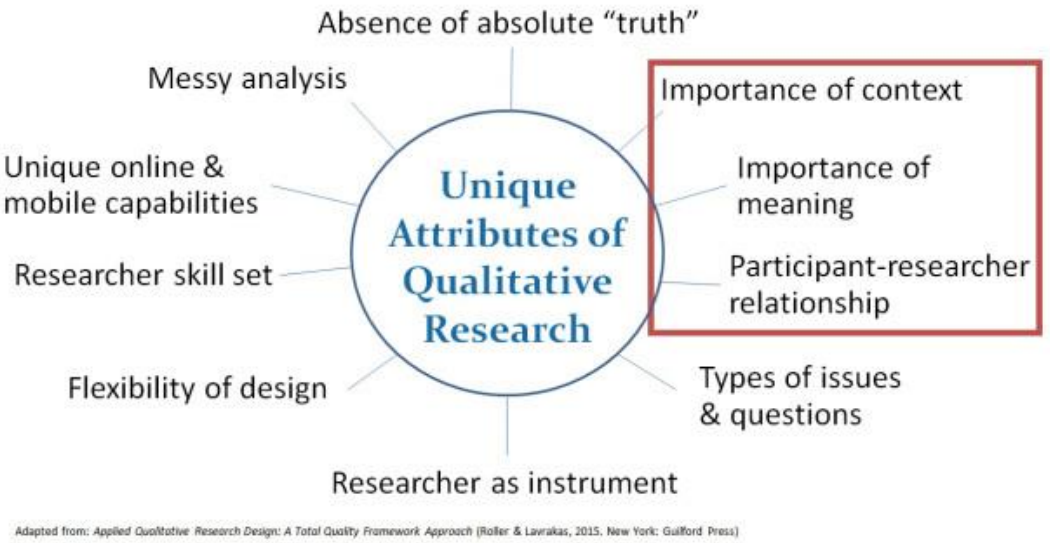
The Three Dominant Qualities of Qualitative Research

Among the 10 distinctive attributes associated with qualitative research, there are three that essentially encompass what it means to use qualitative methods – the importance of **context**, the importance of **meaning**, and the **participant-researcher relationship**. In fact, one could argue that these constitute the three dominant qualities of qualitative research in that they help to define or otherwise contribute to the essence of the remaining seven attributes. The "absence of absolute 'truth'," for instance, is an important aspect of qualitative research that is closely associated with the



Adapted from: *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015. New York: Guilford Press)

research (in-depth interview, focus group, observation) environment where the dominant attributes of context, meaning, and participant-researcher interactions take place. As stated in a November 2016 *Research Design Review* article, the "absence of absolute 'truth'"

refers to the idea that the highly contextual and social constructionist nature of qualitative research renders data that is, not absolute "truth" but, useful knowledge that is the matter of the researcher's own subjective interpretation.

Similarly, there is a close connection between the "researcher as instrument" attribute and the three dominant qualities of context, meaning, and the participant-researcher relationship. A July 2016 *RDR* article described the association this way:

As the key instrument in gathering qualitative data, the researcher bears a great deal of responsibility for the outcomes. If for no other reason, this responsibility hinges on the fact that this one attribute plays a central role in the effects associated with three other unique attributes – context, meaning, and the participant-researcher relationship.

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Other distinctive characteristics of qualitative research – having to do with skill set, flexibility, the types of questions/issues that are addressed (such as sensitive topics, the inclusion of hard-to-reach population segments), the messiness of the data, and the online and mobile capabilities – also derive relevance from the three dominant attributes. Having the necessary skill set, for instance, is important to discerning contextual influences and potential bias that may distort meaning; the particular topic of an interview and type of participant create contextual nuances that impact meaning; online and mobile qualitative research modes present distinct challenges related to context, meaning, and the participant-researcher relationship; and, of course, context and meaning supply the fuel that add to the "messiness" of qualitative data.

Of the three dominant attributes, the relationship between the participant and the researcher (the interviewer, the moderator, the observer) has the broadest implications. By sharing the "research space" (however it is defined), participants and researchers enter into a social convention that effectively shapes the reality – the context and the meaning – of the data being collected. This is particularly true in the in-depth interview method when "power dynamics" (Kvale, 2006) within the interview environment creates the possibility of "a one-way dialogue" whereby "the interviewer rules the interview" (p. 484), or there is a power struggle in which both participant and researcher attempt to control what is said or not said.

With few exceptions (e.g., qualitative content analysis), a social component, as determined by the participant-researcher relationship, is embedded in qualitative research methods regardless of mode (face-to-face, online, phone), resulting in dynamics that establish the context and meaning of the data along with the ultimate usefulness of the outcomes. The three dominant attributes – associated with context, meaning, and the participant-researcher relationship – are deeply entangled with each other and together cast an effect on the entire array of distinctive qualities in qualitative research.

Kvale, S. (2006). Dominance through interviews and dialogues. *Qualitative Inquiry*, *12*(3), 480–500.

From the Society for Qualitative Inquiry in Psychology: A Principled Approach to Research Design

The February 2017 issue of *Qualitative Psychology*, the journal of the Society for Qualitative Inquiry in Psychology (SQIP, a section of Division 5 of the American Psychological Association) starts off with an article titled "Recommendations for Designing and Reviewing Qualitative Research in Psychology: Promoting Methodological Integrity" (Levitt, Motulsky, Wertz, Morrow, & Ponterotto, 2017). This paper is a report from the SQIP Task Force on Resources for the Publication of Qualitative Research whose purpose it is "to provide resources to support the design and evaluation of qualitative research" and, by way of this paper, offers "a systematic methodological framework that can be useful for reviewers and authors as they design and evaluate research projects" (p. 7).

Importantly, the "methodological framework" recommended by the authors is decidedly not a procedural playbook and not a checklist or a how-to guide. Giving researchers "rules" to follow by way of this or any other framework would be illogical for the simple reason that those who design and evaluate qualitative research do so across a variety of methods as well as from any number of paradigms or orientations, e.g., post-positivist, constructivist-interpretive, critical-ideological, phenomenological, pragmatic, and performative inquiry (Levitt, et al., 2017). Therefore, the generic model offered by the authors is appropriately respectful of the "diversity and complexities of qualitative research" while also encouraging researchers to embrace the inherent benefits – such as flexibility and multi-method solutions – of qualitative inquiry and deemphasizing a more restrictive method-centric approach to research design. In this way, the authors' framework asks qualitative researchers to focus on the research *question* in the development and evaluation of qualitative research rather than any particular *method*.

The recommended framework is grounded in the concept of "methodological integrity" which pertains to the trustworthiness of a research study from the standpoint of methodological principles, including adherence to: the research goals, the researcher's philosophical orientation or perspective, and the phenomenon under investigation. Methodological integrity consists of two functioning components: "fidelity to the subject matter" and "utility in achieving goals." The area of fidelity considers how well variations in the subject matter have been captured in the research by way of comprehensive and diverse data sources that adequately reveal variations of a phenomenon, how well the researcher's interpretations are derived from "good quality" data, and how well the researcher has reached out beyond his/her own perspective during the data collection and analysis

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processes. With respect to the latter, a recommended practice is reflexivity such as the use and reporting of the researcher's reflexive journal.

The other component of the recommended framework is the utility of achieving goals. The concept of utility in this context has to do with such issues as: whether interpretations of the data are sufficiently contextualized (i.e., attention is given to the specific context – e.g., location, culture, time period – in which research findings, and *variations* in research findings, are based); whether the data collection process was maximized to foster insightful analyses (e.g., reducing the potential for interviewer bias); whether the findings extend "meaningful contributions" to the research goals or questions by, for example, challenging or expanding on current notions in the literature; and whether the researcher examined deviant cases or outliers in the data and discussed the sense making of research findings in this context.

In essence, the authors' methodological framework is a principled approach that gives qualitative researchers a way to think carefully about the integrity of qualitative research data collection and analysis regardless of the method or the researcher's "world view." Similar to the Total Quality Framework (TQF), the SQIP task force has not provided a step-by-step *prescription* for how researchers should go about their research (or rules reviewers should follow when evaluating qualitative studies) but rather a foundation by which researchers can *conceptualize* and *think* about the trustworthiness of their research in terms of the quality aspects associated with data collection (or "Credibility" in the TQF) and data analysis (or "Analyzability" in the TQF), including the adequacy of reporting that reveals the application of these quality standards (or "Transparency" in the TQF). Ultimately, this principled approach boils down to the pragmatic question of how useful the research findings are in responding to the research goals (or "Usefulness" in the TQF).

The authors' promotion of methodological integrity is a much needed and welcome addition to the discussion of qualitative research design. Their recommended approach will hopefully shine a light on a way to think about quality principles in qualitative research design among psychologists as well as qualitative researchers in other disciplines.

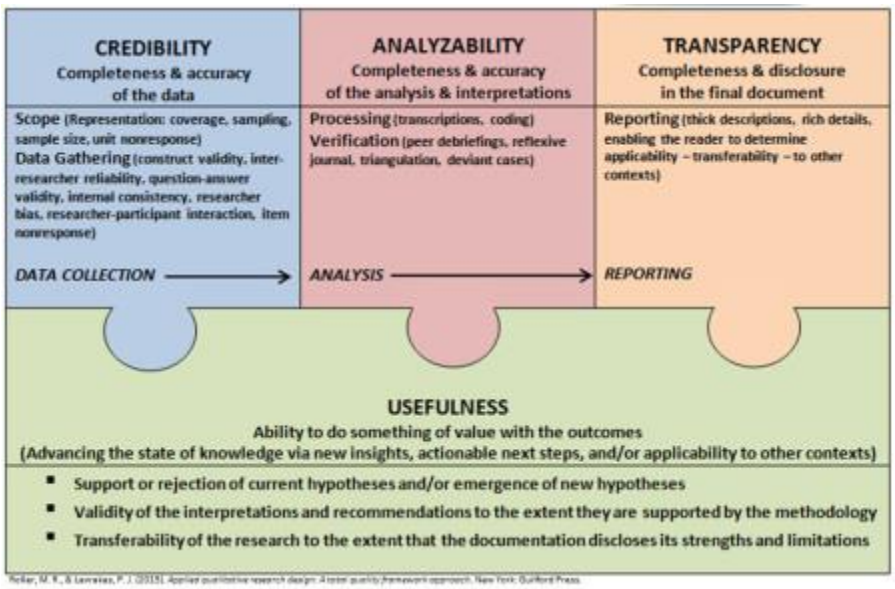
Levitt, H. M., Motulsky, S. L., Wertz, F. J., Morrow, S. L., & Ponterotto, J. G. (2016). Recommendations for designing and reviewing qualitative research in psychology: Promoting methodological integrity. *Qualitative Psychology*, *4*(1), 2–22.

Image captured from: http://qualpsy.org/ , the website for the Society for Qualitative Inquiry in Psychology.

The "Quality" in Qualitative Research Debate & the Total Quality Framework

The following is a modified excerpt from Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015, pp.15-17).

The field of qualitative research has paid considerable attention in the past half century to the issue of research "quality." Despite these efforts, there remains a lack of agreement among qualitative researchers about how quality should be defined and how it should be evaluated (cf. Lincoln & Guba, 1985, 1986; Lincoln, 1995; Morse et al., 2002; Reynolds et al., 2011; Rolfe, 2006; Schwandt, Lincoln, & Guba, 2007). Some who seem to question whether quality can be defined and evaluated appear to hold the view that each qualitative research is so singularly unique in terms of how the data are created and how sense is made of these data that striving to assess quality is a wasted effort that never leads to a satisfying outcome about which agreement can be reached. Among other things, this suggests that validity – meaning, "the correctness or credibility of a description, conclusion, explanation, interpretation, or other sort of account" (Maxwell, 2013, p. 122) – is solely in the eye of the beholder and that convincing someone else that a qualitative study has generated valid and actionable findings is more an effort of subjective persuasion than an effort of applying dispassionate logic to whether the methods that were used to gather and analyze the data led to "valid enough" conclusions for the purpose(s) to which they were meant to serve.



Controversy also exists about how to determine the quality of a qualitative study. Arguments are made by some that the quality of a qualitative study is determined solely by the methods and processing that the researchers have used to conduct their studies. Others argue that quality is determined essentially by how consumers of the study judge it (see Morse et al., 2002; Reynolds et al., 2011).

It is within this context of disharmony and controversy that the Total Quality Framework (TQF)

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was developed. The TQF was designed as a useful tool for qualitative researchers to apply in designing, conducting, and interpreting their research so that the studies are more likely to (a) gather high-quality data, (b) lead to more robust and valid interpretations of the data, and (c) ultimately generate highly useful outcomes.

The TQF also provides a guide for anyone who is consuming the findings and recommendations from a qualitative research study. As such, the TQF is a tool that helps users of the research form a sense of confidence about the likely accuracy and usefulness of the study's findings. The intention is not that applying the TQF will yield a dichotomous (i.e., thumbs-up vs. thumbs-down) judgment that a qualitative study is accurate or not accurate, useful or not useful. Rather, the TQF helps the consumers of a given research study to form a sense of confidence that may range from "not at all confident" to "extremely confident" about the study's validity and usefulness. In this way, the TQF empowers the users of the research to make their own decisions about how much importance should be placed on a qualitative study's findings.

In sum, the TQF offers a comprehensive and interrelated way of thinking that addresses the major threats that can undermine the accuracy and value of a qualitative research study at each phase of the research process. It is valuable to qualitative researchers who are designing a study, who are conducting a study, or who are interpreting a study. The TQF is intended to provide a framework that empowers anyone interested in applying it to formulate their own conclusions about the likely accuracy and therefore usefulness of a qualitative research study.

Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic inquiry*. Beverly Hills, CA: Sage Publications.

Lincoln, Y. S., & Guba, E. G. (1986). But is it rigorous? Trustworthiness and authenticity in naturalistic evaluation. *New Directions for Program Evaluation, 30*(1), 73–84.

Lincoln, Y. S. (1995). Emerging criteria for quality in qualitative and interpretive research. *Qualitative Inquiry, 1*(3), 275–289.

Maxwell, J. A. (2013). *Qualitative research design: An interactive approach* (3rd ed.). Thousand Oaks, CA: Sage Publications.

Morse, J. M., Barrett, M., Mayan, M., Olson, K., & Spiers, J. (2002). Verification strategies for establishing reliability and validity in qualitative research. *International Journal of Qualitative Methods, 1*(2), 13–22.

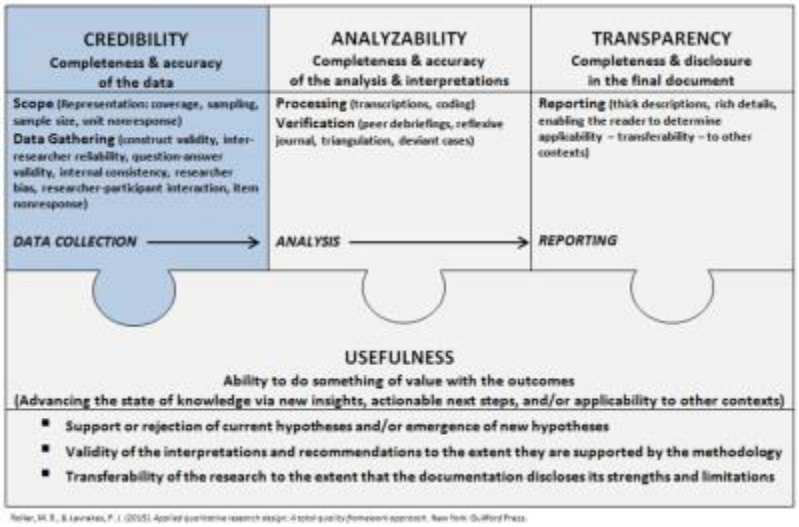
Reynolds, J., Kizito, J., Ezumah, N., Mangesho, P., Allen, E., & Chandler, C. (2011). Quality assurance of qualitative research: A review of the discourse. *Health Research Policy and Systems, 9*(1), 43.

Rolfe, G. (2006). Validity, trustworthiness and rigour: Quality and the idea of qualitative research. *Journal of Advanced Nursing, 53*(3), 304–310.

Schwandt, T. A., Lincoln, Y. S., & Guba, E. G. (2007). Judging interpretations: But is it rigorous? Trustworthiness and authenticity in naturalistic evaluation. *New Directions for Evaluation, 114*, 11–25.

Credible Qualitative Research: The Total Quality Framework Credibility Component

The Total Quality Framework (TQF) has been discussed in several articles appearing in *Research Design Review*. Some of these articles simply reference the TQF in the context of a broader discussion while others – such as "A Quality Approach to the Qualitative Research Proposal" and "Evaluating Quality Standards in a Qualitative Research Literature Review" – speak more directly about applications of the TQF. The TQF is defined as "a comprehensive perspective for creating, managing, and interpreting quality research designs and evaluating the likelihood that a qualitative study will provide information that is valid and useful for the purposes for which the study is intended" (Roller & Lavrakas, 2015, pp. 21-22). In essence, the framework offers qualitative researchers a way to think about the quality of their research designs across qualitative methods as well as a particular paradigm or theoretical orientation. In this way, the TQF is grounded in the core belief that,



if it is agreed that qualitative research can, in fact, serve worthwhile purposes, then logically it would serve those purposes only to the degree that it is done well, regardless of the specific objectives that qualitative researchers strive to address. (p.20)

There are four components to the TQF – Credibility, Analyzability, Transparency, and Usefulness – each pertaining to a distinct aspect of the research process. The schematic (below) shows the interrelatedness of these components, with each of the first three components contributing to the fourth component, and ultimate goal of qualitative inquiry, i.e., Usefulness.

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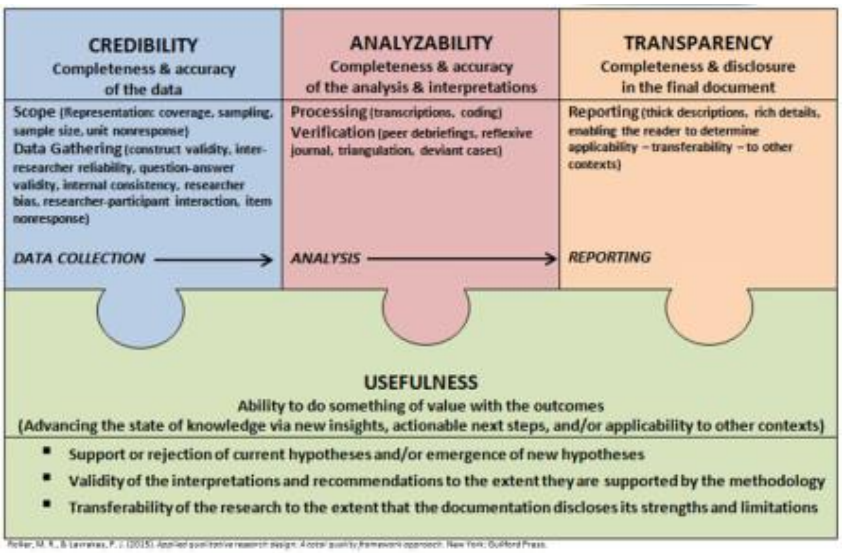
This article is a brief discussion of Credibility which is the TQF component having to do with data collection in qualitative research. Subsequent articles will be devoted to the other three components – Analyzability, Transparency, and Usefulness.



From a TQF perspective, credible qualitative research is the result of effectively managing data collection, paying particular attention to the two specific areas of Scope and Data Gathering. **Scope** has to do with how well the participants from which data are gathered represent the broader population of people that is the focus of investigation. There are four considerations related to Scope. The qualitative researcher needs to think about*: (a) defining the target population; (b) how these individuals will be selected for inclusion in the study (i.e., the source itself – e.g., a list to sample from, a community center to draw from – and the procedures to be used to sample from the source); (c) how many participants the researcher ultimately wants to include in the study; and (d) strategies to maximize the researcher's ability to gain access to and cooperation from the people of interest.

There are articles in *RDR* that discuss the various considerations related to Scope. For example, a *RDR* post back in 2012 titled "Designing a Quality In-depth Interview Study: How Many Interviews Are Enough?" talked about the many factors researchers should think about when determining the number of in-depth interviews to complete for an IDI study, both at the initial design phase as well as when in the field.

Data Gathering is the other critical ingredient to Credibility. Data Gathering has to do with how well the data collected in a qualitative study accurately represent the concepts the study set out to investigate. Data Gathering, you might say, is concerned with construct validity (where "construct" may refer to anything from a narrow topic to a broad and possibly ambiguous concept), addressing the question of How confident am I that my data truly answer my research objectives? There are four considerations the qualitative researcher will want to think about when designing and conducting Data Gathering: (a) identifying the appropriate constructs – *as well as* the specific attributes within each construct – to measure based on the research question or objectives; (b) choosing the appropriate qualitative method *as well as* the appropriate mode; (c) developing the data collection tool(s) to effectively operationalize and measure the constructs and their attributes, e.g., the interview or discussion guide; and (d) mitigating sources of bias and inconsistency associated with the data collector (researcher) *as well as* the participants.

There are many examples in *RDR* of articles that discuss various considerations within Data

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Gathering. For example, the development of an interview guide is the topic of "Interview Guide Development: A 4-Stage 'Funnel' Approach." And articles that address issues of researcher and/or participant bias and inconsistency include "The Recipe for Quality Outcomes in Qualitative Research Includes a Healthy Dose of Consistency," "Mitigating Researcher-as-instrument Effects," and "Qualitative Data: Achieving Accuracy in the Absence of 'Truth'."

Credible qualitative research is derived, not from a strict set of rules to follow but rather, from a keen sense of the research objectives and an understanding of how to think about the research principles that apply to data collection in relationship to the research question under investigation. By way of the TQF Credibility component, qualitative researchers are encouraged to think carefully about the composition (and inclusiveness) of their participants along with the unbiased and consistent manner in which data is gathered. It goes without saying that the flexible and contextual nature of qualitative research will attract any number of missteps – e.g., a skewed participant mix or researcher effects that bias the data – but the point here is that qualitative researchers need to be conscious of these factors, to reflect upon them and record these reflections, and to use this information in the interpretation and reporting of findings. This, of course, is where the other TQF components come in.

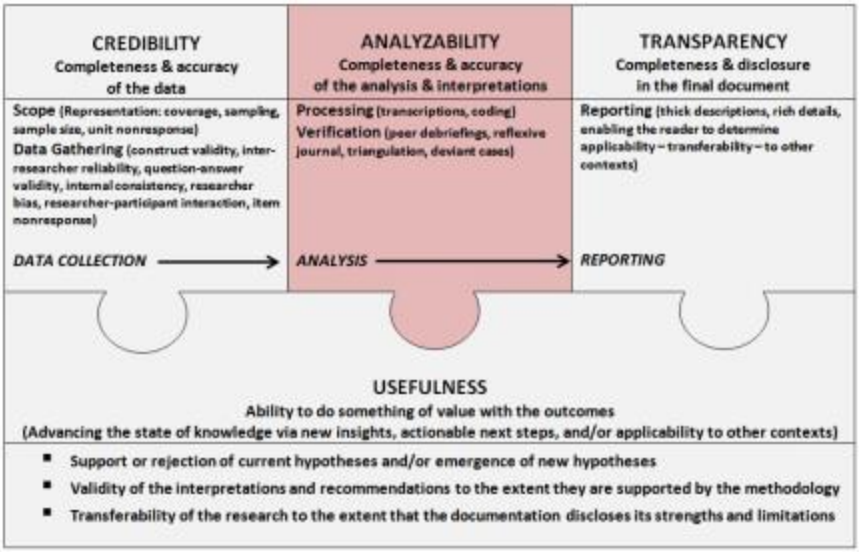
Next time, the TQF Analyzability component.

[*]These considerations also pertain to qualitative content analysis where the focus is on objects and text rather than individuals.

Roller, M. R., & Lavrakas, P. J. (2015). Applied qualitative research design: A total quality framework approach. New York: Guilford Press.

Analyzable Qualitative Research: The Total Quality Framework Analyzability Component

A March 2017 article in *Research Design Review* discussed the Credibility component of the Total Quality Framework (TQF). As stated in the March article, the TQF "offers qualitative researchers a way to think about the quality of their research designs across qualitative methods and irrespective of any particular paradigm or theoretical orientation" and revolves around the four phases of the qualitative research process – data collection, analysis, reporting, and doing something of value with the outcomes (i.e., usefulness). The Credibility piece of the TQF has to do with data collection. The main elements of Credibility are Scope and Data Gathering – i.e., how well the study is inclusive of the population of interest (Scope) and how well the data collected accurately represent the constructs the study set out to investigate (Data Gathering).



The present article briefly describes the second TQF component – Analyzability. Analyzability is concerned with the "completeness and accuracy of the analysis and interpretations" of the qualitative data derived in data collection and consists of two key parts – Processing and Verification. Processing involves the careful consideration of: (a) how the preliminary data are transformed into the final dataset that is used in analysis and (b) the actual analysis of the final set of data. The transformation of preliminary data typically involves converting audio or video recordings to a written transcript. From a TQF perspective, the qualitative researcher needs to give serious thought to, among other things, the quality of the transcripts created, with particular attention to the knowledge and accuracy of the transcriptionist*. The qualitative researcher also needs to reflect on the limitations of transcripts and, specifically, what can and *cannot* be learned from the data in transcript form.

Once the final dataset has been developed, the qualitative researcher is ready to make sense of the data by way of analysis. The analysis process may vary among researchers depending on their particular approach or orientation. Broadly speaking, the analysis involves: (a) selecting the unit of

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analysis (e.g., an entire in-depth interview), (b) developing codes (designations that give meaning to some portion of the data in the context of the interview and research question), (c) coding, (d) identifying categories (i.e., groups of codes that share an underlying construct), (e) identifying themes or patterns across categories, and (f) drawing interpretations and implications.

Verification is the other principal piece of the TQF Analyzability component. It is at the Verification stage – that is, when interpretations and implications are being conceptualized – that qualitative researchers give critical attention to the data by looking for alternative sources of evidence that support *or contradict* early interpretations of the study data. The verification step is an important one that contributes heavily to the overall quality of a qualitative research design. The various verification techniques include: (a) peer debriefing (the unbiased review of the research by an impartial peer), (b) a reflexive journal (the researcher's diary of what went on in the study including reflections on their own values or beliefs that may have impacted data gathering or analysis), (c) triangulation (contrasting and comparing the data with other sources, such as data from different types of participants, different methods, or different interviewers or moderators), and (d) deviant cases (looking for "negative cases" or outliers that contradict the prevailing interpretation). There is another verification technique – member checking – that many researchers endorse but, from a TQF perspective, potentially weakens the quality of a qualitative study[**].

Verification is the topic of discussion in a 2014 article posted in *RDR* – "Verification: Looking Beyond the Data in Qualitative Data Analysis." Readers of this blog will also be interested in the Morse, et al. (2002) article in *International Journal of Qualitative Methods* on verification strategies where the authors advocate utilizing verification "mechanisms" during the course of the qualitative research per se (i.e., not just at the analysis stage) to ensure the "reliability and validity and, thus, the rigor of a study."

Not unlike credible qualitative research (the subject of the March *RDR* post), analyzable qualitative research is the product of knowing how to think about quality approaches to data processing and verification. It is not about concrete procedures to follow but rather the ability to conceptualize and integrate research practices that maximize the validity as well as the ultimate usefulness of a qualitative research study. The TQF Analyzability component is a vehicle by which qualitative researchers can think about where and how to apply quality principles in the processing and verification of their data. In doing so, researchers gain rich interpretations of the data leading to outcomes that address the research question and have value.

Value or usefulness, however, is not solely dependent on credible and analyzable research. Before a qualitative study can be truly useful it must be effectively communicated. That is where Transparency – the third component of the TQF and the subject of the next blog post – comes in.

[*]Specific recommended qualities of a transcriptionist are delineated in Roller & Lavrakas (2015, p. 35).

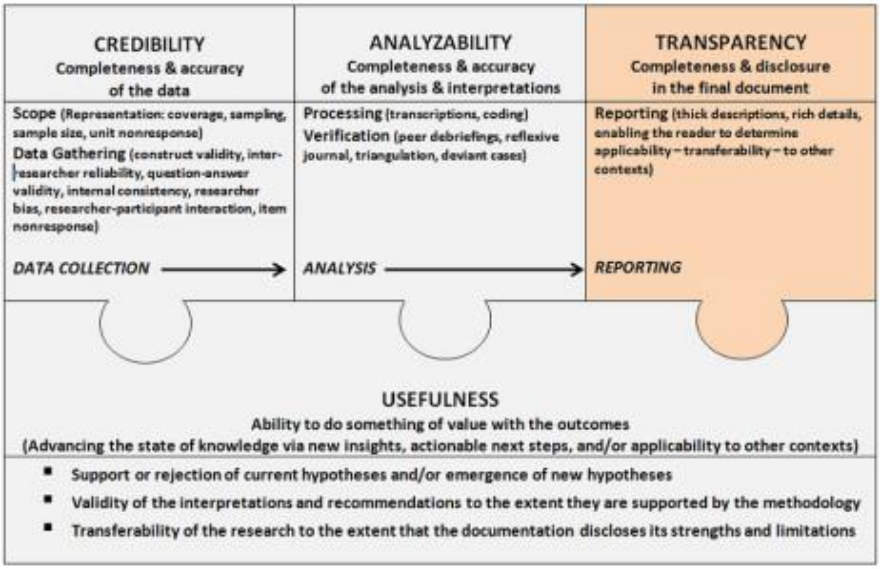
[**]A discussion of member checking and its potential to weaken study design can be found in Roller & Lavrakas (2015, p.43).

Morse, J. M., Barrett, M., Mayan, M., Olson, K., & Spiers, J. (2002). Verification strategies for establishing reliability and validity in qualitative research. *International Journal of Qualitative Methods*, *1*(2), 13–22.

Roller, M. R., & Lavrakas, P. J. (2015). Applied qualitative research design: A total quality framework approach. New York: Guilford Press.

Transparent Qualitative Research: The Total Quality Framework Transparency Component

The Total Quality Framework (TQF)* contributes to the conversation in the qualitative research community by providing researchers with a way to think about their qualitative designs – along with strategies or techniques – for the purpose of enhancing the quality of research outcomes. The TQF is a comprehensive approach that considers all stages of the research process – from data collection to the final "product." Recent articles in *Research Design Review* discussed two of the four components of the TQF – specifically, the Credibility component and the Analyzability component. The Credibility component pertains to data collection and consists of Scope (having to do with sampling and coverage) and Data Gathering (having to do with minimizing potential bias, nonresponse, and other factors that may weaken the validity of the data). The Analyzability component of the TQF is focused on the Processing of qualitative data (e.g., the quality by which the initial "raw" data is transformed) as well as Verification of research findings and interpretations (e.g., by way of deviant cases, peer debriefs, the reflexive journal).



The third component of the TQF has to do with the next phase in a qualitative research design – that is, reporting. When the data has been collected and thoroughly processed and verified, the qualitative researcher is left with the job of effectively communicating what went on in the research study and how the researcher drew interpretations from the analysis. Importantly, the job of reporting goes beyond conveying the research findings and the researcher's interpretations and recommendations, but also gives details of the research design having to do with Scope and Data Gathering (i.e., Credibility) as well as Processing and Verification (i.e., Analyzability). As discussed in this 2013 *RDR* article, the benefit of a detailed discussion of Credibility and Analyzability lies in its ability to fully inform the user of the quality strategies or techniques that were (or were not) incorporated into the design and, among other things, allow the user to evaluate the transferability of the research design, i.e., how well it might be used in a comparable context.

The elaboration of study details is referred to as "thick description" which is a term originally coined by British philosopher Gilbert Ryle and then adopted by Clifford Geertz to describe the work

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being done in ethnography (Ponterotto, 2006). In this respect, Geertz (2003) talks about the "multiplicity of complex conceptual structures" (p. 150) in ethnographic research, stating that "ethnography *is* thick description" (p. 156, emphasis added). Similarly, the "multiplicity" of design decisions that qualitative researchers make before, during, and at the completion of a qualitative study warrant a thick description in the final reporting document that explodes with rich details by which the user can essentially re-live the research process. In doing so, the user is able to evaluate his/her confidence in the research process as well as the researcher's final interpretations and the applicability of the research to other contexts (i.e., transferability).

The TQF Transparency component has been discussed elsewhere in *RDR* – see "Reporting Qualitative Research: A Model of Transparency" – as has the concept of thick description – see "25 Ingredients to "Thicken" Description & Enrich Transparency in Ethnography." The specific elements of a thick description will vary from method to method and study to study. There are, however, common aspects of a qualitative research design that should be reported, some of which are the

- Researcher's assumptions regarding the necessary scope of the study.
- Decisions that were made related to sampling.
- Representativeness of the participants to the population and why that was or was not a concern.
- Level of cooperation and tactics that were used to maximize cooperation.
- Ethical considerations.
- Researcher/interviewer training.
- Interview/focus group guide development.
- Decisions that were made in the field, particularly decisions that changed the initial study design.
- Field notes and the researcher's reflexive journal.
- Transcription process.
- Data processing protocol and verification procedures.

As with Credibility and Analyzability, the Transparency component of the TQF is not intended to prescribe procedures or steps to follow in the reporting process but rather offer researchers a way of thinking about how to incorporate a complete accounting of a research study for the benefit of the user (e.g., the researcher, the research sponsor, a colleague working on a similar topic). It is by way of this thick description that qualitative researchers demonstrate their commitment to transparency while providing an audit trail of the relevant materials. This transparent approach to reporting expands the life of any given study and achieves the ultimate goal of allowing the user to do something of value with the outcomes. That brings us to the fourth and final TQF component, Usefulness.

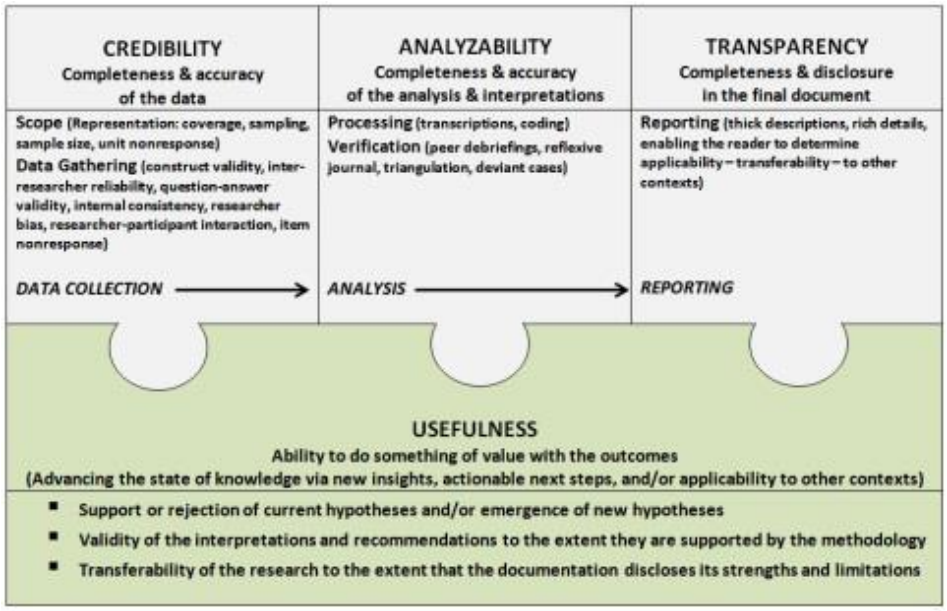
[*] The Total Quality Framework is fully discussed in Roller, M. R., & Lavrakas, P. J. (2015). Applied qualitative research design: A total quality framework approach. New York: Guilford Press.

Geertz, C. (2003). Thick description: Toward an interpretive theory of culture. In Y. S. Lincoln & N. K. Denzin (Eds.), *Turning points in qualitative research: Tying knots in a handkerchief* (Vol. 3, pp. 143–168). Walnut Creek, CA: AltaMira Press.

Ponterotto, J. G. (2006). Brief note on the origins, evolution, and meaning of the qualitative research concept "thick description." *The Qualitative Report*, *11*(3), 538–549. Retrieved from http://www.nova.edu/ssss/QR/QR11-3/ponterotto.pdf

Useful Qualitative Research: The Total Quality Framework Usefulness Component

Our research is of little value if the outcomes are not deemed useful in some way. This is true for all types of research. Whether it is qualitative, quantitative, or a mixed methods approach, the "carrot" that dangles ahead of the research team is the promise of reaching worthwhile, actionable conclusions and recommendations for the users and sponsors of the research. Achieving this objective – reaching the "carrot" of useful research – is the product of the quality measures put into place at the data collection, analysis, and reporting phases of the research design.



The Total Quality Framework (TQF)* offers a way of thinking about these quality measures in a qualitative research design. The TQF is comprised of four inter-related components, each having to do with a stage of the research process. Recent articles in *Research Design Review* have discussed three of these components – Credibility pertaining to data collection, Analyzability having to do with the processing and verification of qualitative data, and Transparency relating to the reporting of details associated with data collection, analysis, and the drawing of interpretations.

The fourth component of the TQF is Usefulness or the "ability to do something of value with the outcomes." The ultimate strength of the Usefulness component is a function of the vigor – the attention to quality – within the Credibility (data collection), Analyzability (analysis), and Transparency (reporting) components. In this way, the Usefulness component relies on each of the other components independently as well as collectively. The goal is to maximize the value of a qualitative research study for the researchers affiliated with the study, the research sponsors, and the users of the research such as researchers working in comparable fields or contexts as well as students investigating the research topic for the first time. The TQF Usefulness component was briefly discussed in *RDR* back in 2012 – see "Designing Qualitative Research to Produce Outcomes You Can Use."

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Broadly speaking, the Usefulness component addresses the question, "What can and should be done with the study now that it has been completed?" Specifically, the usefulness of a qualitative study will be determined in varying degrees from study to study depending on the research question and the particular objectives. When evaluating usefulness, researchers may ask,

- Has the study confirmed or refuted important hypotheses?
- Has the study identified important knowledge gaps that future research should try to help close?
- Has the study offered recommendations for action that are worthy of further testing or worthy of actionable next steps?
- Has the study demonstrated the value of using new or refined methods for gathering qualitative data?
- Has the study demonstrated new or refined methods for analyzing qualitative data?

In keeping with the important role of *useful* qualitative research, it is recommended that a "Usefulness of the Study" section be included in the final research document. The intended purpose of this section is to explain the researcher's views on how the study should be interpreted, acted upon, or applied in other research contexts. Regardless of whether the consumers of the research agree with the stated views, this section serves as an important reminder of the researcher's responsibility to impart their knowledge and perspectives associated with the ultimate goal – useful qualitative research giving people the ability to do something of value with the outcomes.

[*] The Total Quality Framework is fully discussed in Roller, M. R., & Lavrakas, P. J. (2015). Applied qualitative research design: A total quality framework approach. New York: Guilford Press.

Re-considering the Question of "Why" in Qualitative Research

It is easy to fall into the trap of relying on the "why" question when conducting qualitative research. After all, the use of qualitative research is often supported with the claim that qualitative methods enable the researcher to reach beyond quantitative numerical data to grasp the meaning and motivations – that is, the *why* – associated with particular attitudes and behavior. And it is in this spirit that researchers frequently find themselves with interview and discussion guides full of "why" questions – *Why* do you say you are happy? *Why* do you prefer one political candidate over another? *Why* do you diet? *Why* do you believe in God? *Why* do you use a tablet rather than a laptop computer?

Yet "why" is rarely the question worth asking. In fact, asking "why" questions can actually have a negative effect on data collection (i.e., Credibility) and contribute bias to qualitative data. This happens for many reasons, here are just four:

The "why" question potentially

• **Evokes rationality**. By asking the "why" question, researchers are in essence asking participants to justify their attitudes and behavior. In contemplating a justification, it is not unusual for participants to seek a response that "makes sense," seems logical, or is otherwise deemed appropriate. This defensive reaction may go unnoticed (by the participant as well as the researcher) unless participants are asked to reflect further on their rationalizations, allowing the researcher to identify and mitigate potential bias associated with social desirability and other forms of distortions.

• **Stifles the researcher-participant conversation**. The "why" question potentially stifles the research interview or group discussion in at least two ways: 1) It stops the flow of conversation while the participant considers rational scenarios in response to the researcher's question and 2) It requires a certain amount of backtracking by the participant to explain a rationalization that hopefully "makes sense" but may not be particularly relevant to the research topic or intended question.

• **Clouds question meaning**. Along with potentially stifling the interview or group discussion, the "why" question does little to convey the researcher's intent or meaning of the question. As a wide-

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open question, the participant may struggle with its ambiguity and become frustrated in attempts to find meaning. In this regard, the "why" question potentially results in – what survey researchers call – "respondent burden." For example, it is much easier on the participant, and more informative for the researcher, when the question is "What are the specific aspects of your life that make you happy?" compared to "Why do you say you are happy?"

• **Asks a different question from the one intended by the researcher**. In addition to being construed as vague or ambiguous, the "why" question might also be interpreted as asking something different than the researcher's intent. Because of this potential for misinterpretation, the researcher needs to think carefully before asking the "why" question. For example, the question "Why do you use a tablet rather than a laptop computer?" is essentially a different question than "How does a tablet computer offer you advantages over a laptop?

With qualitative inquiry, researchers gain critical insight on the lived experience. But this insight is not necessarily rooted in the *why* of life events as much as it is in the aspects of participants' lives that can only be discovered by asking *what, when, where, who, how* – and sometimes, *why.*

In-the-moment Question-Response Reflexivity

There are lots of articles discussing question design, focusing on such things as how to mitigate various forms of bias, clearly communicate the intended meaning of the question, and facilitate response. Survey question wording is discussed in this "tip sheet" from Harvard University as well as in "Questionnaire Design" from Pew Research Center, and a recent article in *Research Design Review* discussed the not-so-simple "why" question in qualitative research (see "Re-considering the Question of 'Why' in Qualitative Research").

Getting the question "right" is a concern of all researchers, but qualitative researchers have to be particularly mindful of the responses they get in return. It is not good enough to use an interview guide to ask a question, get an answer, and move on to the next question. And, it is often not good enough to ask a question, get an answer, interject one or two probing questions, and move on to the next question. Indeed, one of the toughest skills a qualitative interviewer has to learn is how to evaluate a participant's answer to any given question. This goes way beyond evaluating whether the participant responded in line with the intention of the question or the potential sources of bias. Rather, this broader, much-needed evaluation of a response requires a reflexive, introspective consideration on the part of the interviewer.

Reflexivity is central to a qualitative approach in research methods. It is a topic that is discussed often in *RDR* – see "Interviewer Bias & Reflexivity in Qualitative Research," "Reflections from the Field: Questions to Stimulate Reflexivity Among Qualitative Researchers," and "Facilitating Reflexivity in Observational Research: The Observation Guide & Grid" – because of its role in qualitative research design. There are many wonderful papers and studies on reflexivity. A few of

the most recent examples can be found in the August 2017 issue of *Qualitative Psychology* which is devoted to reflexivity and includes such thoughtful and insightful articles as Shari Goldstein's "Reflexivity in Narrative Research."

Most accounts on reflexivity focus on the reflexive journal and, specifically, the researcher's recording of his/her observations related to the participant and the research environment as well as the researcher's assumptions and beliefs that may have affected the outcomes. These after-the-fact considerations are essential to the integrity of the research. However, equally essential is the

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reflexive exercise that researcher's practice in situ, i.e., in the course of an in-depth interview (IDI) or group discussion. This in-the-moment reflection, while in the research environment with the participant(s), is the time when the researcher must think carefully about *what* is being said, the extent to which the researcher *understands* what is being said, and the degree to which this understanding actually *mirrors the participant(s) true intent*.

Here are a few of the questions the researcher might contemplate throughout an IDI or group discussion:

- Can I explain, in my own words, what was said?
- Can I explain, in my own words, the meaning of what was said as it relates to the research question?
- How much of what I think I understand stems from the participant(s) rather than something I heard from other study participants?
- How much of what I think I understand stems from the participant's meaning rather than my subjective assumptions, beliefs, or personal experiences?
    - What are the words or phrases that I may be misinterpreting because I am contaminating them with my own assumptions, beliefs, or personal experiences?
- Have my emotional reactions to the participant's responses affected (biased) my understanding?
- Can I conclude the research event confident of what I learned from this/these participant(s) or do I need to prolong the event to ask clarifying questions?

It is this kind of in-the-moment reflexive exercise that ensures the integrity and the ultimate usefulness of the qualitative data.

Image captured from: http://futureofcio.blogspot.com/2015/02/reflection-in-design-thinking.html

Rapport & Reflection: The Pivotal Role of Note Taking in In-depth Interview Research

Note taking is fundamental to the in-depth interviewing process and an essential interviewer skill.

And yet note taking – e.g., why note taking is important, how to take notes, and how to use notes from a completed interview – does not get much attention. Note taking is important – actually, *critical* – to the in-depth interview method because it is about much more than jotting down a participant's comments and responses to the interviewer's questions.

In fact, an effective note taker is a more effective interviewer. This is because

- Taking notes during an interview helps to focus the interviewer's attention on the participant's point of view and lived experience relevant to the research question.
- Taking notes helps the interviewer internalize what is being said by the participant which in turn helps the interviewer identify seemingly contradictory statements and follow up on new, insightful topic areas that may not appear on the interview guide.
- The interviewer's heightened focused attention and internalization helps to build rapport and enhances the participant-researcher relationship.
- The interviewer can add sidebar notations while taking notes that add context to what is being discussed or remind the interviewer to follow up on a particular comment.
- Taking notes allows the interviewer to identify and flag important quotes made by the participant in the moment when the contextual import of participant's statements can be fully appreciated and noted.

An effective note taker is also better equipped to conduct meaningful analyses of the data, leading to useful outcomes. This is because

- The notes serve as an immediate resource for reflection: 1) during the interview – when the interviewer can flip back and forth to consider the participant's earlier comments and ask for clarification as the need arises to fully comprehend and better analyze the participant's point of view – and 2) at the completion of the interview – when the interviewer can quietly review the interview notes and add any informative annotations that will aid analysis.

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- The interviewer can use the notes from each interview to record the participant's attitudes and behavior related to each primary and secondary research question. Ideally, this should be done within an hour of the interview completion and by way of Excel, where the columns consist of key research questions and the rows contain input from each participant. This format allows the researcher to quickly capture interview data when it is fresh on the mind as well as easily review and analyze the data within and across participants.

Importantly, the note taking discussed here pertains to notes *written by hand* (pen [or Echo smartpen] on paper) in contrast to taking notes with an electronic device. Research has shown that the use of laptops (for example) is great at creating large volumes of notes (with lots of verbatims) but it also encourages a "mindless" transcription rather than a meaningful engagement with the material. Indeed, as reported in this research, individuals who wrote their notes by hand demonstrated "a stronger conceptual understanding and were more successful in applying and integrating the material" compared to those who took notes with their laptops.

Handwritten note taking compels the interviewer to fully engage with the participant and fosters highly reflective behavior in the researcher. You might say that, in this way, note taking helps to maintain the all-important participant-researcher relationship throughout data collection and analysis; a relationship that can be too easily lost when utilizing more mechanical processes such as the reliance on audio recordings and data transcripts.

Image captured from: https://www.skipprichard.com/power-handwritten-note/

The Limitations of Transcripts: It is Time to Talk About the Elephant in the Room

Transcripts of qualitative in-depth interviews and focus group discussions (as well as ethnographers' field notes and recordings) are typically an important component in the data analysis process. It is by way of these transcribed accounts of the researcher-participant exchange that analysts hope to re-live each research event and draw meaningful interpretations from the data. Because of the critical role transcripts often play in the analytical process, researchers routinely take steps to ensure the quality of their transcripts. One such step is the selection of a transcriptionist; specifically, employing a transcriptionist whose top priorities are accuracy and thoroughness as well as someone who is knowledgeable about the subject category, sensitive to how people speak in conversation, comfortable with cultural and regional variations in the language, etc.*

Transcripts take a prominent role, of course, in the utilization of any text analytic or computer-assisted qualitative data analysis software (CAQDAS) program. These software solutions revolve around "data as text," with any number of built-in features to help sort, count, search, diagram, connect, quote, give context to, and collaborate on the data. Analysts are often instructed to begin the analysis process by absorbing the content of each transcript (by way of multiple readings) followed by a line-by-line inspection of the transcript for relevant code-worthy text. From there, the analyst can work with the codes taking advantage of the various program features.

An important yet rarely discussed impediment to deriving meaningful interpretations from this qualitative analysis process is the very thing that is at the center of it all – data transcripts. Although serving a utilitarian purpose, transcripts effectively convert the all-too-human research experience that defines qualitative inquiry to the relatively emotionless drab confines of black-on-white text. Gone is the profound mood swing that descended over the participant when the interviewer asked about his elderly mother. Yes, there is text in the transcript that conveys some aspect of this mood but only to the extent that the participant is able to articulate it. Gone is the tone of voice that fluctuated depending on what aspect of the participant's hospital visit was being discussed. Yes, the transcriptionist noted a change in voice but it is the significance and predictability of these voice

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changes that the interviewer grew to know over time that is missing from the transcript. Gone is an understanding of the lopsided interaction in the focus group discussion among teenagers. Yes, the analyst can ascertain from the transcript that a few in the group talked more than others but what is missing is the near-indescribable sounds dominant participants made to stifle other participants and the choked atmosphere that pervaded the discussion along with the entire group environment. And gone of course are all of the many mannerisms and physical clues that gave away the insights the researcher was looking for.

Transcripts are simply a device. Yet, even with the addition of ancillary non-converted data from audio and video recordings, transcripts are in essence the typical center of the analysis universe. Unfortunately, they have the effect of distancing the researcher from the reality – so quickly lost – of an in-depth interview or group discussion. It is simply not possible to honestly imitate the participant-researcher relationship and co-constructed nature of qualitative research by way of a textual approach. So, it is curious why discussions on qualitative analysis are replete with how-to's on working with transcripts but devoid of an equally-active discussion on their limitations as a purveyor of qualitative data.

The deafening silence on the limitations of transcripts has become the elephant in the room. The behemoth void waiting to be filled with smart discussions on the true quality of our transcript data, what we can and cannot learn about our data in transcript form, alternative ways to use transcripts (in piecemeal or in whole), and how to perform an integrative analysis that offers real procedures for incorporating transcribed data with other formats.

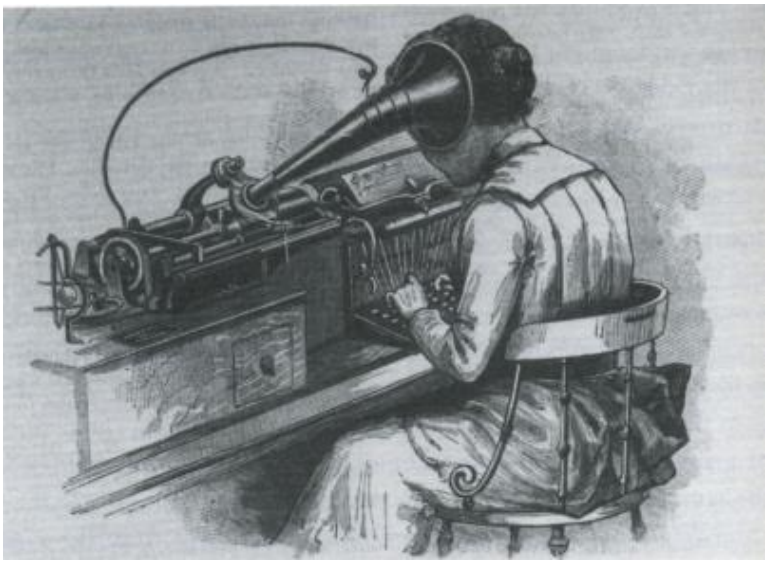
* Discussions of the role of transcripts and transcriptionists in the quality of qualitative data (generally and specific to particular methods) can be found in: Roller, M. R., & Lavrakas, P. J. (2015). Applied qualitative research design: A total quality framework approach. New York: Guilford Press.

Image captured from: http://fineartamerica.com/products/elephant-in-the-room-wip-leah-saulnier-the-painting-maniac-poster.html

Transcribing & Transcriptions in Narrative Research

The following is a modified excerpt from Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015, pp. 320-321).

The use of transcripts in qualitative research has been discussed elsewhere in *Research Design Review* (see this February 2017 article), emphasizing the idea that "it is by way of these transcribed accounts of the researcher-participant exchange that analysts hope to re-live each research event and draw meaningful interpretations from the data." The creation and use of transcriptions, however, take on special meaning in narrative research where the primary goal is to maintain the narrative as a whole unit. To this end, the narrative researcher must decide how best to construct the transcripts so they retain the story as it was told, while also facilitating the researcher's ability to derive meaning from the data as it relates to the research objectives.



This process might result in any number of transcription formats. For example, Riessman (2008) presents two transcriptions of a conversation she had with a Hindu woman in a study of infertility: One transcription was developed around the "co-construction process" (i.e., the interviewer's role in the narrative as it was told), and another transcription excluded the interviewer and was structural in nature (e.g., the transcriber paid particular attention to how the narrative was spoken, such as pauses and intonations, from which "stanzas" or content groups could be formed). With these transcriptions, Riessman illustrates that "different theoretical assumptions about language, communication, and 'the self' are embedded in each transcript" (p. 36).

Another example is what Glesne (1997) called "poetic transcription" defined as "the creation of poem-like compositions from the works of interviewees" (p. 202).

From a Total Quality Framework perspective*, the important consideration is not so much in prescribing a particular format or style of the transcriptions but rather on upholding the entirety of

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the narrative and the researcher's ability to make credible interpretations of the data. However, because the form of the transcription may impact the researcher's interpretations of the outcomes (e.g., a transcript that omits the interviewer might be interpreted differently compared to a transcript that includes every spoken word), it is incumbent upon the researcher to disclose the exact nature of the transcription process and the resulting transcript(s) in the final document.

[*]The Total Quality Framework has been discussed many times in *Research Design Review*. The most recent article appeared September 2017 titled "The 'Quality' in Qualitative Research Debate & the Total Quality Framework."

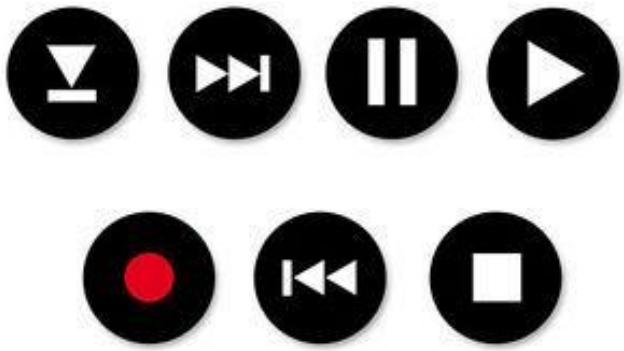
Glesne, C. (1997). That rare feeling: Re-presenting research through poetic transcription. *Qualitative Inquiry*, *3*(2), 202–221. http://doi.org/10.1177/107780049700300204

Riessman, C. K. (2008). *Narrative methods for the human sciences*. Thousand Oaks, CA: Sage Publications.

Image captured from: https://ucl100hours.wordpress.com/networking-with-tubes-cylinders-juliette-kristensen/

The Virtue of Recordings in Qualitative Analysis

A February 2017 article posted in *Research Design Review* discusses qualitative data transcripts and, specifically, the potential pitfalls when depending only on transcripts in the qualitative analysis process. As stated in the article,



Although serving a utilitarian purpose, transcripts effectively convert the all-too-human research experience that defines qualitative inquiry to the relatively emotionless drab confines of black-on-white text. Gone is the profound mood swing that descended over the participant when the interviewer asked about his elderly mother. Yes, there is text in the transcript that conveys some aspect of this mood but only to the extent that the participant is able to articulate it. Gone is the tone of voice that fluctuated depending on what aspect of the participant's hospital visit was being discussed. Yes, the transcriptionist noted a change in voice but it is the significance and predictability of these voice changes that the interviewer grew to know over time that is missing from the transcript. Gone is an understanding of the lopsided interaction in the focus group discussion among teenagers. Yes, the analyst can ascertain from the transcript that a few in the group talked more than others but what is missing is the near-indescribable sounds dominant participants made to stifle other participants and the choked atmosphere that pervaded the discussion along with the entire group environment.

Missing from this article is an explicit discussion of the central role audio and/or video recordings – that accompany verbal qualitative research modes, e.g., face-to-face and telephone group discussions and in-depth interviews (IDIs) – play in the analysis of qualitative data. Researchers who routinely utilize recordings during analysis are more likely to derive valid interpretations of the data while also staying connected to the fundamental goal – the *raison d'être* – of qualitative research, i.e., to embrace the complicated realm of the lived experience to gain an in-depth understanding of people in relationship to the research question(s).

In this regard, there are at least two key advantages to conducting a careful examination of the recordings, advantages that are missing when solely relying on transcripts. A review of the recordings

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- **Aids in recalling peripheral but critical content.** This is content that is typically deemed outside the scope of interest by the transcriptionist, such as the "mood swing" mentioned in the above excerpt. In that case, a review of the recording allows the researcher to hear (and see in a video recording) the energy in the participant's voice when talking about his mother's illness and reminds the researcher of how this energy ebbed and flowed, bouncing from rapid-fire gleeful enthusiasm to barely audible doubt and despair spoken in unusual voice variations and accompanied by fully engaged eye contact or distracted attention depending on the direction of his mood.
- **Clarifies meaning by way of a broader context.** As the excerpt above suggests, it is only by re-living the focus group discussion with teenagers through the recording that the researcher begins to gain an understanding of the profundity of the "choked atmosphere" in the group and its impact on the outcomes. Unlike the transcript, the recording reminds the researcher of how and when the atmosphere in the group environment shifted from being open and friendly to quiet and inhibited; and how the particular seating arrangement, coupled with incompatible personality types, inflamed the atmosphere and seriously colored participants' words, engagement, and way of thinking. The discussion content and derived meaning gathered within this context will clearly be at odds with the content and meaning derived from a separate focus group discussion consisting of teenagers with similar characteristics, discussing responses to the same discussion guide, but with personalities that foster a supportive group dynamic environment.

Qualitative researchers owe it to their participants to think carefully about the nuance and complexities of their lives as shared in a focus group discussion or IDI. Not unlike note taking (discussed here), developing a standard practice of reviewing recordings "helps to maintain the all-important participant-researcher relationship" by preserving the integrity of the qualitative event and retaining the essence of what it means to conduct qualitative research.

Image captured from: http://www.ebay.com.au/itm/Lot-Badge-Button-25mm-Bouton-Radio-Cd-Control-Panel-Play-Stop-Rec-Eject/320968137417

The Use of Quotes & Bringing Transparency to Qualitative Analysis

The use of quotes or verbatims from participants is a typical and necessary component to any qualitative research report. It is by revealing participants' exact language that the researcher helps the user of the research to understand the key takeaways by clarifying through illustration the essential points of the researcher's interpretations. The idea is not to display an extensive list of what people said but rather provide quotes that have been carefully selected for being the most descriptive or explanatory of the researcher's conceptual interpretation of the data. As Susan Morrow has written

"An overemphasis on the researcher's interpretations at the cost of participant quotes will leave the reader in doubt as to just where the interpretations came from [however] an excess of quotes will cause the reader to become lost in the morass of stories." (Morrow, 2005, p. 256)

By embedding carefully chosen extracts from participants' words in the final document, the researcher uniquely gives participants a voice in the outcomes while contributing to the credibility – *and transparency* – of the research. In essence, the use of verbatims gives the users of the research a peek into the analyst's codebook by illustrating how codes associated with particular categories or themes in the data were defined during the analysis process.

As an example, the analysis of data from a recent in-depth interview study among business decision makers determined that the broad concept of "relationships" was a critical factor to driving certain types of decisions. That alone is not a useful finding; however, the analysis of data within this category uncovered themes that effectively gave definition to the "relationships" concept. As shown below, the definitional themes, in conjunction with illustrative quotes from participants, give the reader a concise and useful understanding of "relationships."

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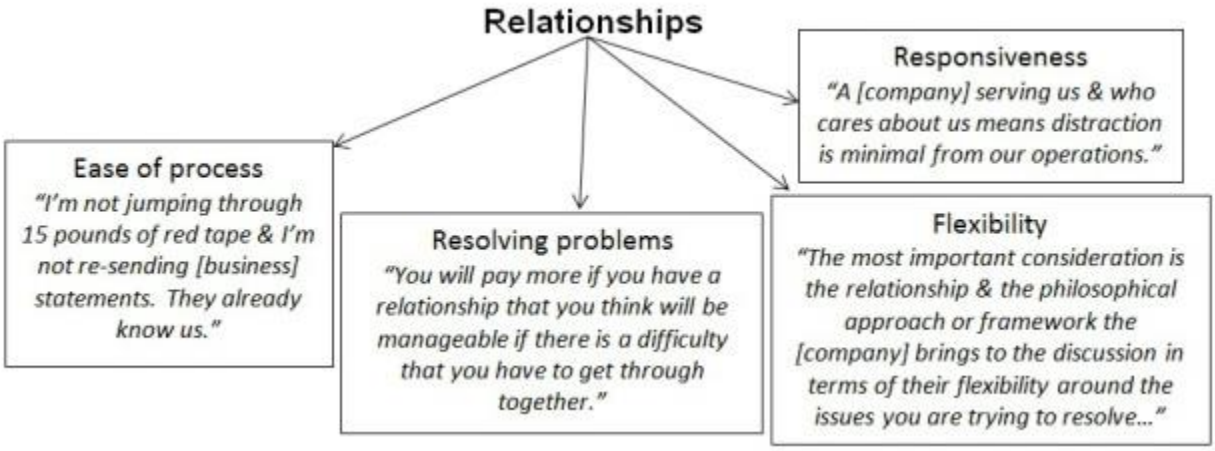

In this way, quotes contribute much-needed transparency to the analytical process. As discussed elsewhere in *Research Design Review* (e.g., see this April 2017 article), transparency in the final document is built around "thick description," defined as "a complete account…of the phenomena under investigation as well as the rich details of the data collection and analysis processes and interpretations of the findings" (Roller & Lavrakas, 2015, p. 363). One of the ingredients in a thick description of the analytical process is the details of code development and the coding procedures. The utilization of verbatims from participants in the final report adds to the researcher's thick description (and transparency) by helping to convey the researcher's thinking during data analysis and how that thinking steered the creation and application of codes.

Morrow, S. L. (2005). Quality and trustworthiness in qualitative research in counseling psychology. *Journal of Counseling Psychology*, *52*(2), 250–260. http://doi.org/10.1037/0022-0167.52.2.250

Roller, M. R., & Lavrakas, P. J. (2015). *Applied qualitative research design: A total quality framework approach*. New York: Guilford Press.

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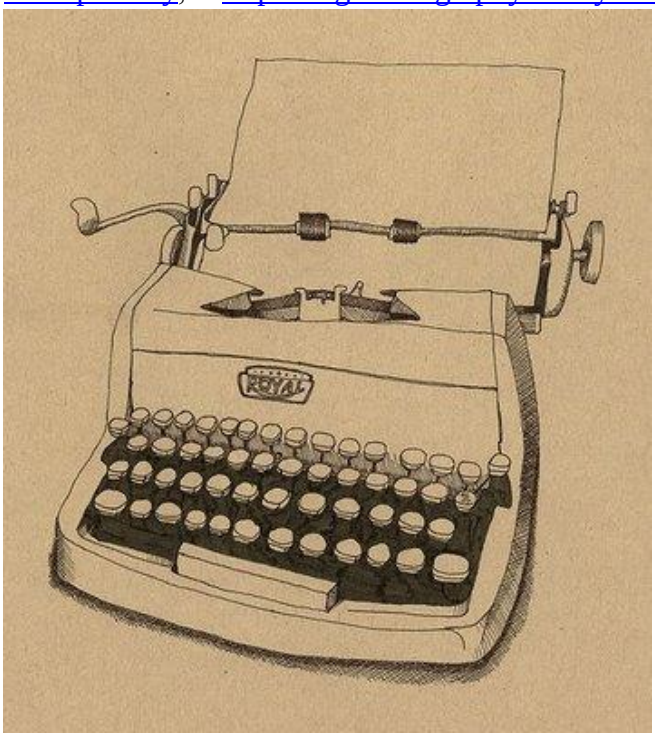
Article pertaining to: Qualitative Reporting

The Many Facets of a Meaningful Qualitative Report

Reporting in qualitative research, and particularly the element of transparency, has been the topic of various articles in *Research Design Review* (see "Reporting Qualitative Research: A Model of Transparency," "Reporting Ethnography: Storytelling & the Roles Participants Play," and others).



While all types of research require complete and accurate reporting, the final report appears to be discussed less frequently compared to other aspects of the research process. This is certainly true in qualitative research. Just a look around *RDR* will prove the point that a greater emphasis has been paid to other research design areas – such as data collection and analysis – than to the actual reporting of the findings.

This needs to change. One could argue that the final written report is the most important component of the research process, the component that not only serves to document the study from beginning to end but also transforms qualitative research into a tangible, living "being" for the research users to grab hold of and utilize in any number of ways. Without the report, our research might as well not exist. This makes one wonder why relatively scant attention is paid to best practices in reporting and, indeed, why the final report in some research sectors (e.g., marketing research) is often reduced to a less-than-comprehensive, fully-bulleted PowerPoint slide deck.

For anyone interested in a serious discussion of the many facets of the qualitative report, an excellent resource is *Focus Group Discussions* by Monique Hennink (2014, Oxford University Press as part of their Understanding Qualitative Research series edited by Patricia Leavy). Although the book is centered on the focus group method, the chapters devoted to reporting offer relevant and useful guidance regardless of the qualitative approach. For example, Hennink's chapter on "Writing Focus Group Methods," discusses the challenges researchers face when attempting to give "methodological depth" to their reporting while also writing in a clear and concise manner. Using qualitative terminology such as *purposive* and *emic*, for instance, are important to conveying the qualitative orientation (and rigor) of the research; however, these concepts are not universally understood and require some form of explanation.

Following a discussion of *challenges*, the methods chapter goes on to detail the actual *writing* of the methods section. Here, Hennink stresses the importance of transparency; specifically, in reporting

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information on the: study design (e.g., how and why the particular method was chosen), research site(s) (e.g., where the research was conducted, what was the atmosphere or condition of the study environment), recruiting, study participants, data collection, analysis, as well as ethical issues. Equally important in the methods section are discussions emanating from reflexivity, i.e., the researcher's reflection on possible sources of bias in the data or analysis associated with the research team as well as limitations in the study (e.g., the research was only conducted with women of a certain age).

In her second chapter on writing, Hennink discusses the writing of results with a focus on "developing an argument" from which the narrative of the findings can be told and deciding on a reporting structure (e.g., by topics, population segments) as well as the use of quotations.

Importantly, Hennink discusses the crucial role of context in the reporting of both methods and results. In line with the qualitative research mantra "context is everything," Hennink encourages the researcher to report contextual details that potentially influenced the method(s) chosen and the research findings, thereby adding a depth of meaning by which users of the research are able to fully understand all aspects of the study. There are many ways the qualitative researcher can discuss context. Context can be discussed with respect to: circumstances that impacted the choice of research method, participants (their sociocultural background), the research environment(s), and the researcher (i.e., reflexivity).

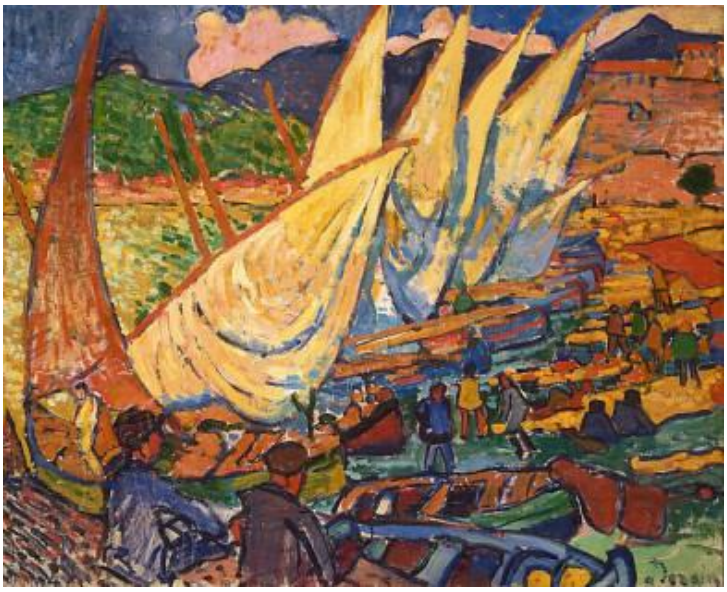
Although the level of reporting advocated by Hennink is at the academic level, there are important lessons here for all qualitative researchers. Qualitative reporting requires a thorough and thoughtful process, one that communicates the richness of the qualitative approach and ultimately maximizes the Usefulness of the outcomes.

Image captured from: https://www.elephantjournal.com/2013/11/a-poem-inspired-by-writers-block-yoli-ramazzina-poem/

The "Real Ethnography" of Michael Agar

Several years ago, when working on *Applied Qualitative Research Design*, I began reading the works of Michael Agar. To simply say that Agar was an anthropologist would be cutting him short; and, indeed, *Anthropology News*, in an article published shortly after Agar's death in May 2017, described him as

"a linguistic anthropologist, a cultural anthropologist, almost an South Asianist, a drug expert, a medical anthropologist, an applied anthropologist, a practicing anthropologist, a public anthropologist, a professional anthropologist, a professional stranger, a theoretical anthropologist, an academic anthropologist, an independent consultant, a cross cultural consultant, a computer modeler, an agent-based modeler, a complexity theorist, an environmentalist, a water expert, a teacher…"



One doesn't need to look far to be enlightened as well as entertained by Mike Agar – On the "Scribblings" page of his Ethknoworks website, he lightheartedly rants about the little money most authors make in royalties stating "If you divide money earned by time invested in writing and publishing, you'll see that you'd do better with a paper route in Antarctica." It may be this combined ability to enlighten and entertain that drew me to Agar and keeps me ever mindful of the words he has written and the ideas he instilled.

For some reason I come back to his 2006 article "An Ethnography By Any Other Name…". In it, Agar explores the question "What is a *real* ethnography?" with discussions of debates ("tension") between anthropologists and sociologists, and about various nuances such as whether applied anthropology is actually "real" given that "ethnography no longer meant a year or more by yourself in a village far from home" (Agar, 2006, p. 4), where ethnographers' focus should be (the community or a particular problem), and geographical (Agar was deemed a "South Asianist") and institutional labels. These debates have sparked many questions including "Is educational ethnography *really* ethnography?" (Agar, 2006, p.3) as well as the provocative, Is ethnography really "qualitative research"? These days, Agar might also wonder about modern-day "in-home ethnographies" and "video ethnography," asking What are these approaches really, and can we really call them "ethnography"?

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Of particular interest in this 2006 article is Agar's discussion of what he considers "acceptable and unacceptable ethnography," and specifically his focus on abductive logic along with meaning and context. The emphasis here is on the idea that any ethnography "has to produce new concepts" untethered from earlier or existing theories and instead emerging from the researcher's embrace of "surprises" in the data and an eagerness to pursue them. This willingness to pursue revolutionary observations in the data also supports the added notion of "iterative abduction" which speaks to a flexible approach to ethnography, e.g., altering the interview guide as warranted after each set of two or three interviews. Flexibility is an important attribute to qualitative research and is actually one of 10 unique attributes discussed in an earlier article in *Research Design Review*.

But acceptable ethnography, according to Agar, goes beyond abductive logic to include meaning and context. Importantly, Agar is referring to the meaning and context which is derived from absorbing a different point of view while in pursuit of surprising concepts. In doing so, the ethnographer is not looking for or analyzing "variables" within an observed event but rather "patterns" of behavior or activities. Like flexibility, meaning and context are two of the 10 unique attributes associated with qualitative research as discussed in the *RDR* article mentioned earlier. Going one step further, I would suggest that meaning, context, *as well as the participant-researcher relationship* are the three unique attributes of qualitative research that underscore and serve to define the remaining seven attributes.

An article posted in *RDR* in 2014 concerns the very topic of contextual meaning in ethnography – see "Observational Research Nurtures a Growing Interest in Contexts." This article talks briefly about sensory ethnography, quoting Dawnel Volzky

"I find that I am much more able to 'do sensory ethnography' when I slow down and take the time to properly assess people and situations. My bias and assumptions need to be set aside, and I must seek to truly sense the truth about the object that I am studying. My view must be both broad and detailed, and my account to others must embody the truest picture possible."

As in all qualitative research, the research skills of most import in the ethnographic approach are those of patience, reflection, the ability to set aside assumptions and beliefs while also embracing the meaning and context of our participants in order to come as close as we are capable to their reality.

Thank you, Michael Agar.

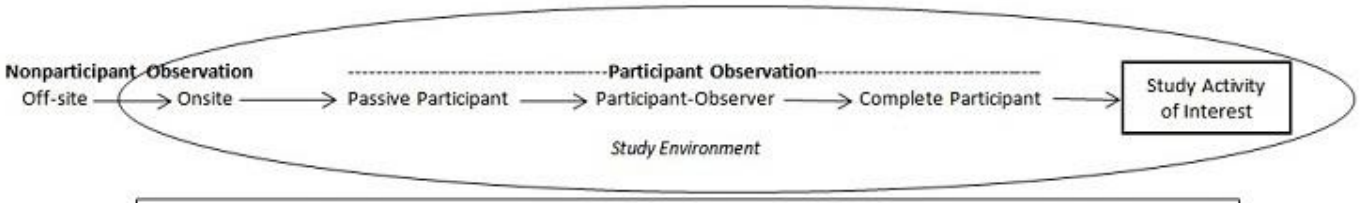
Agar, M. (2006). An ethnography by any other name…. *Forum Qualitative Sozialforschung / Forum: Qualitative Social Research*, *7*(4), 1–24.

Image captured from: http://www.metmuseum.org/art/collection/search/482510

The Five Observer Roles in Ethnography

There are many variations of observational research, both off-and online, but central to the ethnographic approach is the role of the observer. This role has to do with both the *physical* as well as the *psychological* or emotional distance between the observer and the observed, and can range from remote off-site observation to complete immersion and participation in the study activities.

Broadly speaking, the observer is conducting either nonparticipant or participant observation. In nonparticipant observation, the observer may be either off- or onsite; and, in participant observation, the observer may be passive, a participant-observer, or a complete participant. Importantly, the observer may switch roles in the course of a study, e.g., moving from an on-site nonparticipant observer to a passive observer, then a participant-observer, and then a complete participant. These five observer roles are depicted below.



Adapted from *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015, p. 173).

Nonparticipant Observation

As a nonparticipant, the observer is observing in an unobtrusive manner either remotely (off-site) or within the study environment (onsite). An **off-site nonparticipant** observation might be the study of an online community or forum without any involvement (participation) by the observer, or the observation of teaching methods via remote monitors located in a separate building.

Onsite nonparticipant observation moves the observer into the study environment and closer to the activity of interest; however, like off-site observation, the onsite nonparticipant observer is not engaging with participants. An example of this role is the work of Griffiths (2011) who worked as a change attendant at an amusement arcade in order to observe gambling behavior, and Lyall and Bartlett (2010) who observed how psychiatrists made decisions regarding patient leave by unobtrusively accompanying them on their ward rounds.

Participant Observation

In each of the three participant observation roles, the observer is located within the study

(continued)

environment and engaged with the participants at some level beyond mere observation. A **passive participant** observer, for example, conducting an ethnographic study of teamwork among soccer players on the field, might use breaks in the game to ask players questions regarding their experiences or help distribute water and towels after the game.

A **participant-observer** is more engaged with participants than in the passive role. For instance, in the soccer study mentioned earlier, the participant-observer might actually go on the field with the soccer players to hear what is discussed in the huddle.

The fifth and most involved observer role is the **complete participant**. In this role, the observer is fully engaged with participants. So, in the soccer study, the observer might join the team (assuming he/she has the necessary qualifications) and be involved in the team activities on and off the field. Schouten and McAlexander (1995) provide an example of the complete participant role in the study they conducted with owners of Harley-Davidson motorcycles to understand the biker subculture. They began their observations as onsite nonparticipant observers but shifted to participant-observers and then to complete participant observers when they decided that a fully engaged role would give them "an empathetic sense of a biker's identity, psyche, and social interactions in the context of everyday life" (p.46).

The observer role or roles in an ethnographic study should be carefully determined and discussed during the design, analysis, and reporting phases of the research. Along with the particular role of the observer, the design, analysis, and reporting should give deliberate thought to the observer's status; specifically, whether the observation will be overt or covert. This is an important factor in observational research that cannot be taken lightly for many reasons, not the least of which is the associated ethical considerations (which are discussed in this *RDR* article).

Griffiths, M. D. (2011). A typology of UK slot machine gamblers: A longitudinal observational and interview study. *International Journal of Mental Health and Addiction*, *9*(6), 606–626. http://doi.org/10.1007/s11469-010-9291-4

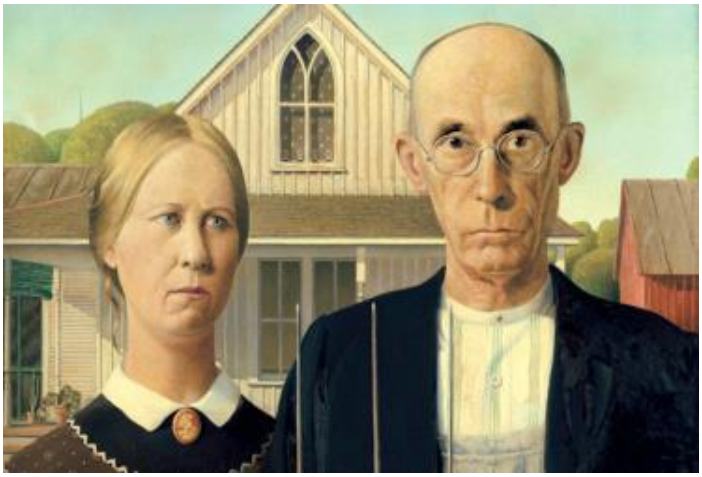
Lyall, M., & Bartlett, A. (2010). Decision making in medium security: Can he have leave? *Journal of Forensic Psychiatry & Psychology*, *21*(6), 887–901. http://doi.org/10.1080/14789949.2010.500740

Schouten, J. W., & McAlexander, J. H. (1995). Subcultures of consumption: An ethnography of the new bikers. *Journal of Consumer Research*, *22*, 43–61.

Article pertaining to: Specific methods – Content Analysis

The Unique Quality of Qualitative Content Analysis

A unique attribute of qualitative content analysis is the focus on a continual process of revising and developing meanings in the data based on new discoveries. Unlike quantitative content analysts who set their coding scheme early in the research process — typically modifying it only slightly or not at all during data collection — qualitative researchers methodically and frequently revisit the content they are studying to better understand each relevant piece as well as its relationship to the entire context from which it was chosen (sampled), thereby modifying how and what they are coding throughout the data collection period. In this way, and as Krippendorff (2013) points out, qualitative content analysis puts the analyst in a *hermeneutic circle*[1] whereby interpretations are reformulated based on new insights related to, for example, a larger context.



This more flexible, less rigid, approach to content analysis also embraces the notion of multiple meanings derived from multiple sources. A case in point is triangulation, which is used in qualitative analysis to verify the analyst's interpretations by considering alternative points of view or analyzing deviant cases. It is this more far-reaching consideration of the data — along with the added support of the research participants' verbatim comments that are typically included in the final research document — that is indicative of the unique qualities of the qualitative approach.

Indeed, it is the inductive strategy in search of latent content, the use of context, the back-and-forth flexibility throughout the analytical process, and the continual questioning of preliminary interpretations that set qualitative content analysis apart from the quantitative method.

Adapted from Roller & Lavrakas, 2015, p. 233-234.

[1]Krippendorff (2013) uses the concept of the "hermeneutic circle" in content analysis to mean that "text is interpreted relative to an imagined context, and these interpretations in turn reconstruct the context for further examination of the same or subsequently available text" (p. 259).

Krippendorff, K. (2013). *Content analysis* (3rd ed.). Thousand Oaks, CA: Sage Publications.

Roller, M. R., & Lavrakas, P. J. (2015). *Applied qualitative research design: A total quality framework approach*. New York: Guilford Press.

Image captured from: http://mentalfloss.com/article/64853/15-things-you-might-not-know-about-american-gothic

The Unexpected in Mixed Methods Research

It is with great expectation that mounting attention is being given to mixed methods research (MMR). The utilization of various methods – a combination of those that focus on the *quantity* of something (i.e., quantitative methods) along with ways to explore the *quality* of something (i.e., any number of qualitative methods and techniques) – holds the promise of "richer," more encompassing research solutions that go beyond the one-sided mono-method design alternative. Indeed, MMR offers the potential of added value to both the sponsors as well as the consumers of research.

There are many different ways to configure a MMR study. As briefly mentioned in a January 2017 RDR post, there are various typologies or defined formats that can guide an MMR design; better still, however, are flexible approaches to MMR that enable the researcher to shift methods as warranted by incremental outcomes and fully integrate methods throughout the process.

Regardless of the roadmap the researcher follows, it is often the case that, at some point in time in a MMR study, a qualitative component will be conducted to help explain or give deeper understanding to survey data. This particular type of sequential approach (quantitative followed by qualitative) can be extremely useful in gaining the contextual knowledge – the *why, what, how, who, when, where* of an attitude or behavior – that enlightens the researcher with real meaning behind otherwise plain-wrapped discrete bits of data. Jellesmark, Herling, Egerod, and Beyer (2012), for instance, conducted a survey concerning the fear of falling among elderly people who recently underwent a hip replacement, asking such closed-ended rating questions as "How concerned are you of falling while cleaning your house?" Jellesmark, et al. then conducted follow-up in-depth interviews with a subset of respondents in order to explore more deeply the experience of falling, asking important (almost soul-searching) questions such as "What does it mean for you to fear falling?" and "How does fear of falling affect your daily life?"

The objective in this type of sequential MMR design is to better understand – on a very human, lived-experience level – the responses to survey questions and requires a carefully chosen qualitative researcher who is fully trained and informed on the overarching research objectives as well as those specific to the qualitative component. Importantly, this researcher must be prepared for the unexpected. The unexpected can arrive in different shapes and forms. In one respect, the researcher – like all good qualitative researchers – must be ready to hear widely varying attitudes

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and experiences on a given topic that are beyond anything anticipated (e.g., based on earlier research). In another respect, the researcher may meet the unexpected when follow-up interviews reveal that participants have actually misunderstood the intent of the survey question and are ill-fitted for the qualitative segment of the MMR study.

This can happen, for instance, when conducting a study with young mothers concerning the degree to which fruits and vegetables are included in their children's diets. The unexpected may happen during follow-up in-depth interviews with a subset of mothers who indicated that their children's diet is "heavy" on fruits and vegetables yet "many" participants discuss diets full of such foods as strawberry ice cream and blueberry pie along with pickles and French fries. Assuming that the researcher's intent was to measure the incidence of *fresh* fruits and vegetables in children's diets, these participants' comments in the qualitative segment of the MMR would be deemed irrelevant and these participants would be deleted from the qualitative sample. More important, however, is the implication these qualitative outcomes have for the research design as a whole and the survey design in particular. In this example, the researcher will need to go back to the research objectives, re-think the intended meaning of "fruits" and "vegetables," and re-design the survey questionnaire to more accurately measure the construct of interest.

By looking for and being attuned to the unexpected in MMR, researchers can effectively "mix" quantitative and qualitative methods by integrating outcomes regardless of where this may lead, even when it leads to revamping the MMR design.

Jellesmark, A., Herling, S. F., Egerod, I., & Beyer, N. (2012). Fear of falling and changed functional ability following hip fracture among community-dwelling elderly people: An explanatory sequential mixed method study. Disability and Rehabilitation, 34(25), 2124–2131.

Image captured from: http://www.alisanagnostakis.com/on-being-different-are-you-an-apple-or-an-orange-or-maybe-an-applorange/

Making Connections: Practical Applications of the Total Quality Framework in Mixed Methods Research

The Total Quality Framework (TQF) (Roller & Lavrakas, 2015) offers researchers a way to think about qualitative research design from the vantage point of core principles. It is an approach that helps qualitative researchers develop critical thinking skills by giving explicit attention to the quality of the conceptualization and implementation of their qualitative studies. The TQF is composed of four components, each pertaining to a phase of the research process – data collection (Credibility), analysis (Analyzability), reporting (Transparency), and the ability to do something of value with the outcomes (Usefulness).

Qualitative research is most often conducted as a standalone study but frequently conducted in conjunction with quantitative methods. A mixed methods research (MMR) design involves collecting both qualitative and quantitative data, then *integrating or connecting* the two datasets to draw interpretations derived from the combined strengths of both sets of data (Creswell, 2015). The integration of, or making the connection between, the qualitative and quantitative components is fundamental to MMR and distinguishes it from a multi-method approach that simply utilizes different methods. In contrast, a *mixed* methods design incorporates any number of qualitative and quantitative methods (and modes) with the specific intention of blending the data in some fashion. Mixed methods research is the subject of an earlier article in *Research Design Review*.

So, how do we apply the TQF to a MMR design? It is not good enough to simply think of the qualitative component of MMR as a separate feature to the overall design and apply a TQF approach to the qualitative method(s). For MMR, the TQF needs to be adapted to accommodate a qualitative-quantitative connection as discussed earlier. There are many ways to do this. A few practical applications of the TQF in MMR are outlined below.

Credibility (Data Collection)

A necessary and highly practical consideration in the course of collecting in-depth interview data is the question of the number of interviews to complete. To address this question, the TQF presents 10 related questions* for the researcher to contemplate when in the field, such as

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- Did all interviewees provide clear, unambiguous answers to key questions or issues, or does the researcher need to go back to some interviewees for clarification?
- Can the researcher identify the sources for variation and contradictions within the data?
- Do the data confirm or deny what is already known about the subject matter?

The kinds of questions the researcher might contemplate in a MMR design are similar but are now tweaked to connect qualitative data gathering with the quantitative component. In each case, the researcher is expanding his/her thinking to consider the implications associated with the collecting of qualitative data *as well as* that associated with the quantitative. The researcher conducting a MMR study might now consider,

- Did all interviewees provide clear, unambiguous answers to key questions or issues; *if not, does the researcher need to go back to the participant(s) or leave clarification for the quantitative component*?
- Can the researcher identify the sources for variation and contradictions within the qualitative data *as well as between the qualitative and quantitative data*?
- Do the data confirm or deny what is known *from the quantitative data*?

Analyzability (Analysis)

The TQF offers numerous ways to approach the processing and verification of qualitative data. One of the suggested verification strategies has to do with reflexivity and, specifically, the reflexive journal. The reflexive journal gives researchers the opportunity to respond to questions intended to foster introspection along with an understanding of the researcher's effect on the qualitative data. These reflections further the researcher's ability to verify the interpretations of qualitative data during the analysis process. In a standalone qualitative study, the researcher's reflexive journal might include the contemplation of such questions as*

- What do I think I "know" from this/these participant(s) and how do I think I "know" it?
- What assumptions did I make (what did I assume to be true) about the participant(s)?
- How did my personal values, beliefs, life story, and/or social/economic status affect or shape the questions I asked, the interjections I made, my listening skills, and/or behavior?

If the researcher was conducting MMR, the reflexive journal would address similar questions but now in the context of the broader MMR scheme. To connect the qualitative component with the quantitative, the reflexive journal asks the researcher to think about

- What do I think I "know" from this/these participant(s) and *how has that been influenced by what I may know from the quantitative data*?
- What assumptions did I make (what did I assume to be true) about the participant(s) *based on what I may know about respondents to the quantitative survey*?
- How did my *understanding of the quantitative data* affect or shape the questions I asked, the interjections I made, my listening skills, and/or behavior?

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Transparency (Reporting)

The Transparency component of the TQF has to do with reporting the outcomes in the final document; specifically, reporting a "thick description" of study details (NOTE: For earlier *RDR* articles on thick description, see this April 2017 article and this 2015 article). By conveying the details of the data collection and analysis processes, the researcher allows the users of the research (e.g., other researchers, the sponsor) to examine the researcher's work and draw their own conclusions as well as transfer the design to other contexts. There are many details about the study that the researcher may want to address in the final document*, including the

- Adequacy (i.e., comprehensiveness) of the lists that were used to represent the target population.
- Failure to interview all interviewees sampled, efforts that were made to avoid this, and possible biases or weakness this may have caused.
- Field notes (e.g., note-taking procedures, examples from the field notebook).

In MMR, the qualitative researcher needs to pay attention to connecting the qualitative component with the quantitative portion of the study. To do this in the reporting phase, the researcher interjects the thick description with details relevant to both the qualitative and the quantitative research. For example, the details might include the

- *Compatibility* of the lists with that *used in the quantitative phase*.
- Failure to interview *comparable types of people*, efforts that were made to avoid this, and possible biases or weakness this may have caused.
- Field notes (e.g., *examples when qualitative data converged/diverged with quantitative data*).

Usefulness (Doing something of value with the outcomes)

Ultimately, the objective of our research efforts is to derive outcomes that respond to the research question and provide outcomes that serve a valuable purpose. In many instances, a MMR approach fulfills this goal more so than a standalone qualitative or quantitative study by expanding and enriching the researcher's understand beyond the "borders" of a mono-method study. The *Journal of Mixed Methods Research* and other resources are filled with examples of ways MMR has contributed to important societal issues:

Health

- Cultural nuances among dementia caregivers, e.g., social stigma of dementia (Weitzman & Levkoff, 2000)

Education

- Procrastination & motivation among students with learning disabilities (Klassen et al., 2008)

Conservation

- Conservation adoption decision process among farmers, e.g., importance of communication, rapport, & incentives (Nyanga, 2012)

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Psychology

- Meaning-making underlying bereaved mothers' adaptive and complicated grief responses to the death of a child from cancer (Gerrish, et al., 2014)

Food Safety

- Gap between knowledge & behavior (Meysenburg et al., 2014).

When adapting a quality approach to the qualitative component of MMR, it is not sufficient to simply treat the qualitative portion as an independent element in the overall MMR design. Indeed, it is critical and fundamental to the MMR approach to make a connection between the qualitative and quantitative facets of the study. The few practical examples discussed in this article illustrate how qualitative researchers can make these connections while, at the same time, maintaining the integrity of the unique epistemology underpinning qualitative inquiry.

*See Roller & Lavrakas (2015) for a complete list of questions / thick description details.

Creswell, J. W. (2015). *A concise introduction to mixed methods research*. Thousand Oaks, CA: Sage.

Gerrish, N. J., Neimeyer, R. A., & Bailey, S. (2014). Exploring maternal grief: A mixed-methods investigation of mothers' responses to the death of a child from cancer. *Journal of Constructivist Psychology*, *27*(3), 151–173.

Klassen, R. M., Krawchuk, L. L., Lynch, S. L., & Rajani, S. (2008). Procrastination and motivation of undergraduates with learning disabilities: A mixed-methods inquiry. *Learning Disabilities Research & Practice*, *23*(3), 137–147.

Meysenburg, R., Albrecht, J. A., Litchfield, R., & Ritter-Gooder, P. K. (2014). Food safety knowledge, practices and beliefs of primary food preparers in families with young children: A mixed methods study. *Appetite*, *73*, 121–131.

Nyanga, P. H. (2012). Factors influencing adoption and area under conservation agriculture: A mixed methods approach. *Sustainable Agriculture Research*, *1*(2), 27–40.

Roller, M. R., & Lavrakas, P. J. (2015). Applied qualitative research design: A total quality framework approach. New York: Guilford Press.

Weitzman, P. F., & Levkoff, S. E. (2000). Combining qualitative and quantitative methods in health research with minority elders: Lessons from a study of dementia caregiving. Field Methods, 12(3), 195–208.

Image captured from: https://blog.wiziq.com/tag/connecting-online/