

Qualitative Research Design:

Selected Articles from *Research Design Review* Published in 2015

Margaret R. Roller

Research Design Review – www.researchdesignreview.com – is a blog first published in November 2009. RDR currently includes over 130 articles concerning quantitative and qualitative research design issues. This paper presents the 17 articles that were published in 2015 devoted to qualitative research design. These articles discuss best practices in research design for a range of qualitative methods – in-depth interviews, focus groups, ethnography, multiple methods – and emphasize the need for quality standards in qualitative research design that lead to credible, analyzable, transparent, and ultimately useful outcomes. This quality approach to qualitative research is discussed at length in a new book from Guilford Press – *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015). As we state in the book:

www.rollerresearch.com

rmr@rollerresearch.com

January 2016

““If it is agreed that qualitative research can, in fact, serve worthwhile (‘good’) purposes, then logically it would serve those purposes only to the degree that it is done (‘executed’) well...” (p. 20)

Table of Contents

Social Constructionism & Quality in Qualitative Research Design	1
The Interviewee’s Role in the Qualitative Interview: Interpreter or Reporter?	3
25 Ingredients to “Thicken” Description & Enrich Transparency in Ethnography	5
Online Group Discussions: Participants’ Security & Identity Questions	7
Finding Connections & Making Sense of Qualitative Data	9
A Qualitative Approach to Survey Research Design: Shedding Light on Survey Responses	11
Helping Survey Data “Line Up”: Qualitative Lends a Hand	13
Working with Multiple Methods in Qualitative Research: 7 Unique Researcher Skills	15
The Recipe for Quality Outcomes in Qualitative Research Includes a Healthy Dose of Consistency	16
Interview Guide Development: A 4-Stage “Funnel” Approach	18
Lessons in Best Practices from Qualitative Research with Distinct Cultures	20
The Relative Value of Modes	22
Should Qualitative Research Be Taken Seriously?	24
A Best Practices Approach to Guide (Not Stifle) Qualitative Inquiry	25
Using a “Design Display” to Guide Qualitative Research Design	26
Weighing the Value of Qualitative Research Outcomes	28
A Quality Approach to the Qualitative Research Proposal	30

Social Constructionism & Quality in Qualitative Research Design

February 11, 2015

If you haven't already, I strongly encourage you to take a look at [Kenneth Gergen's](#) video on ["Social Constructionist Ideas, Theory and Practice."](#) In it, Dr. Gergen provides an overview of how social constructionists think and how such thinking can (and should) apply to real-world matters. Social constructionism is not one thing, not one theory or approach, but rather a "creative resource" that enables a new, expanded way of talking and thinking about concepts. Indeed, it might be said that a constructionist view is one where all so-called "realities" are conceptual in nature, a product of our own personal "baggage" (values) and the relationship we have with the object of our experience (e.g., a person, a product, an event).



In this way, a social constructionist orientation is devoid of the notions pertaining to "truth," objectivity, and value neutrality; embracing instead the idea that "truth" is elusive while objectivity and value neutrality simply weaken our ability to look at and think about things from a multiplicity of perspectives that ultimately enriches our understanding and moves us toward new positive outcomes. Qualitative research design from a constructionist mindset, for instance, might lead to new methods of inquiry, or perhaps a greater emphasis on storytelling and the participant-researcher relationship in narrative research.

Social constructionism and qualitative research is a natural marriage, wedded by a mutual respect for the complexities of the human experience and the idea that any one facet of someone's life (and the researcher's role in exploring this life) intertwines with (contributes to) some other facet. That, as human beings we can't be anything other than intricately involved together in the construction of our worlds. We can see how fundamental this is to qualitative research by just looking at the ["10 Distinctive Qualities of Qualitative Research"](#) which includes the essence of constructionism such as the:

- Absence of "truth"
- Importance of context
- Importance of meaning
- Participant-researcher relationship
- Flexibility of the research design

The question remains, however, whether this marriage – between social constructionism and qualitative research – can survive alongside a "framework" intended to guide research design down a path that ultimately leads to useful outcomes. Is a framework that helps guide the researcher to quality outcomes compatible with the creative thinking of the social constructionist? Absolutely. Not only can this alliance *survive* a quality approach to research design, it can actually *thrive*.

The Total Quality Framework (TQF) ^{*} is one such approach. Like social constructionism itself, it is an approach that is not prescriptive in nature but rather a high-level way of thinking about qualitative research design. The TQF aids the researcher in designing and implementing qualitative research that is credible, analyzable, transparent, and ultimately useful to those who sponsor the research as well as those who may look to adapt the research to other contexts. In doing so, the TQF asks the researcher to think carefully about design-implementation considerations such as: the range of people who are included (and excluded) from participation, researcher training and data gathering techniques, analytical and reflective processes, and the transparency of the reporting. Importantly, the TQF does *not* ask the researcher to compromise the critical foundation on which qualitative research is built, i.e., its distinctive qualities that celebrate complexity, multiplicity, flexibility, diversity, “irrationality” and contradiction.

Quality considerations walk hand-in-hand with social constructionism (and many theoretical or philosophical orientations), you might even say that they need each other. A quality approach is driven by the researcher’s understanding and utilization of the socially-constructed world (e.g., use of language, the imbalance of power) while the social constructionist ultimately requires research outcomes that are useful.

**Roller, Margaret R., & Lavrakas, Paul J. (2015). *Applied Qualitative Research Design: A Total Quality Framework Approach*. New York: Guilford Press.*

Image was captured from: <http://malefeminist.tumblr.com/post/32889041868>

The Interviewee's Role in the Qualitative Interview: Interpreter or Reporter?

February 26, 2015

In all sorts of research it is common to ask not only about behavior – When did you first begin smoking cigarettes? How often do you take a multivitamin? Where did you go on your most recent vacation? – but also the “why” and/or “what” questions – What prompted you to start smoking?



Why do you take a multivitamin? Why did you pick that particular spot for your most recent vacation? It is usual for the researcher to want to know more than just what happened. The researcher's goal is typically to go beyond behavior, with a keen interest in getting to the *thinking* that can be linked with the behavior. It is this “probing” that enables the researcher to make associations and otherwise interpret –

give meaning to – the data.

This is, after all, what keeps marketing researchers up at night. It is difficult to remember a time when marketing researchers were *not* obsessed with the reasons people buy certain products/services and not others. Whether rational or irrational, conscious or not conscious, or the result of “slow” or “fast thinking,” marketing researchers have always been gold diggers searching for the psychological nuggets that *motivate* one (buying) behavior over another.

Researchers – and, especially, *qualitative* researchers – in all disciplines are interested in what lies beyond behavior. The educational researcher, for example, does more than simply correlate test scores with teaching methods but delves – on a student level – into why some teaching methods work better than others. The qualitative sociologist is not interested in looking at the incidence of domestic violence without also gaining the victims' personal narratives that ultimately serve to shape the researcher's analysis. Psychologists may conduct experiments to assess the factors most associated with levels of stress, but it is the underlying emotional connections within each individual that give meaning to experimental outcomes.

It is common, therefore, for the researcher to be interpreting, making sense of, qualitative data that is packed with participants' own thoughts (own *analysis*) of their behavior. It is by analyzing participants' own account – e.g., associated with their purchase behavior, their response to certain teaching methods, or their victimization – that researchers form broader interpretations of the data.

And yet, a case can be made for limiting participants in a qualitative interview to strictly descriptive narrative – this is what happened, this is what happened next, ... – and actually stifling their speculation or elaboration on the whys and wherefores of their experiences. [Karin Olson](#), a professor of nursing at the University of Alberta, presented a webinar on February 11, 2015 in which she talks about [“Interviewing in the Context of Qualitative Research.”](#) Among other things, Dr. Olson stresses the importance of *not* allowing interviewees to self-assess or interpret their experiences; prescribing instead that interviewers lead interviewees down a purely descriptive path whereby the focus is on recounting “instances of the experience.” In fact, when “deciding whom to interview,” Dr. Olson identifies five characteristics of the “ideal informant,” one of which is “non-

analytic.” A non-analytic participant, according to Dr. Olson, is someone who “is able to focus just on description and not on analysis,” leaving it to the researcher (not the participant) to “answer the ‘why’ question.”

The research objective of any particular qualitative study will dictate what, and how much, is asked of participants. In the case of research with hospital patients, for instance, the objective may be to record the experiences of people who have undergone a form of therapy to treat a specific type of cancer. The researcher here is interested in the consequences of therapy (e.g., level of fatigue), not necessarily the patients’ assessments of what contributed to these “instances of experience” resulting from therapeutic treatment.

So, while the interpretation of qualitative data is often a joint venture, where both participants and researchers have a say on why participants think a particular way or behave as they do, there are times when qualitative researchers want interviewees to act as reporters, describing “just the facts” from which the researcher can draw relevant interpretations.

Image captured from: Image captured from: <http://blog.a-b-c.com/2014/07/15/just-the-facts-maam>

25 Ingredients to “Thicken” Description & Enrich Transparency in Ethnography

March 16, 2015

Transparency plays a pivotal role in the final product of any research study. It is by revealing the study’s intricacies and details in the final document that the ultimate consumers of the research gain the understanding they need to (a) fully comprehend the people, phenomena, and context under investigation; (b) assign value to the interpretations and recommendations; and/or (c) transfer some aspect of the study to other contexts. Transparency, and its importance to the research process, has been discussed often in this blog, with articles in [November 2009](#) and [December 2012](#) devoted to the topic.



At the core of transparency is the notion of “thick description.” The use of the term here goes beyond its traditional meaning of

“describing and interpreting observed social action (or behavior) within its particular context...[along with] the thoughts and feelings of participants as well as the often complex web of relationships among them. Thick meaning of findings leads readers to a sense of verisimilitude, wherein they can cognitively and emotively ‘place’ themselves within the research context” (Ponterotto, 2006, p. 543).

to also include detailed information pertaining to data collection and analysis. Ethnography, for example, is greatly enriched (“thickened”) by the reporting of specifics in 25 areas related to the:

1. Research objectives, hypotheses, constructs, and an explanation as to why ethnography was the best approach.
2. Target population.
3. Sampling, e.g., determining sample size and participant/site selection.
4. Individuals or groups that were actually observed and their representativeness of the target population.
5. Rationale for opting for a nonparticipant or participant observer role and the mode.
6. Rationale for the choice of [overt or covert observation](#).
7. Observation sites.
8. Rationale for the number of scheduled observations.
9. Status of scheduled observations, e.g., how many and which of those scheduled were actually completed.
10. Ethical considerations.
11. Other methods (such as in-depth interviews) that were used to augment the observations.
12. Decisions that were made in the field that had the effect of altering the research objectives and/or aspects of the research design.
13. [Observer training](#) that took place to mitigate observer effects.
14. Role of gatekeepers and key informants.
15. Observers’ [reflexive journals](#).
16. Unanticipated events that took place during the observations, e.g., the revelation of a covert

observer's identity.

17. Use of extended or expanded observations for verification purposes.

18. **Verification** efforts beyond expanded observations.

19. Operational logistics, e.g., recordings, mapping.

20. Transcription processes.

21. Coding procedures.

22. Thematic and pattern-building analytical processes.

23. Specific observed events and related evidence that exemplify the final interpretations of the data.

24. Particular steps that were taken for an online ethnography.

25. Members of the research team.

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.

Image captured from: http://pragyabhagat.blogspot.com/2010_11_01_archive.html

Online Group Discussions: Participants' Security & Identity Questions

March 30, 2015



Every researcher working with human subjects strives to ensure the highest ethical standards. Regardless of whether the research is quantitative or qualitative in nature – or in the field of health, communications, education, psychology, marketing, anthropology, or sociology – researchers care about protecting the confidentiality, anonymity, and basic “rights” (such as privacy and freedom of thought) of the people who agree to be part of their studies. It is with this in mind that, in addition to gaining IRB approval (as required), researchers openly discuss the goals and intended use of their research with participants, as well as asking them to carefully read and agree to the appropriate consent forms. Online group discussions (focus groups) present a particularly delicate matter. Unlike any other overt form of research – unlike an online survey dominated by closed-end questions, or an online in-depth interview with one person at any moment in time – the online group discussion – with its amalgamation of many people (typically, strangers to each other) responding at

length to many open-ended questions over the course of multiple (possibly, many) days – potentially raises important security and identity concerns among participants. Even with a signed consent form, online group participants may still have serious doubts about the containment of their input to the discussion and, hence, their willingness to contribute openly and *honestly* with the other participants. It is the researcher’s responsibility to address these concerns by *proactively* giving direct attention to questions such as:

- Where and for how long will participants’ comments and uploaded material (e.g., images, videos) linger in “data storage”?
- What are the security measures that are in place and who will have access to the research data (i.e., participants’ comments and uploaded material)?
- Who, other than the moderator, will be observing the discussion in the virtual back room?
- How much of a participant’s identity is actually known by the moderator, the observers, and the other participants?
- Will the other participants keep participants’ comments confidential, i.e., not share comments made in the discussion with anyone outside the group?

(continued)

- Will participants be identified with their comments either internally (i.e., via the final report or presentation) or externally (e.g., via text snippets in an online blog or posting a participant's uploaded video on YouTube)?
- What recourse does a participant have if any security or identity violation occurs?

Image captured from: <http://www.moillusions.com/optical-illusion-fingerprints/>

Finding Connections & Making Sense of Qualitative Data

April 22, 2015

The analysis of qualitative research data is no small thing. Because the very nature of qualitative research is complicated by the complexities inherent in being human, attempting to qualitatively measure and then make sense of behavior and attitudes is daunting. In fact, it is this overwhelming aspect of qualitative research that may lead researchers – who live in the real world of time and budget constraints – to succumb to a less-than-rigorous analytical process.



And yet, Analyzability* is a critical component in qualitative research design.

All of the data collection in the world – all the group discussions, IDIs, observations, storytelling, or in-the-moment research – amounts to a meaningless exercise unless and until a methodical processing and verification of the data is conducted. Without the thoughtful work required to achieve a quality research product, qualitative data simply sits as an inert compilation of discrete elements lacking import.

Finding the connections in the qualitative data that make sense of the phenomenon, concept, or construct under investigation may, for some, be difficult and worthy of shortcuts; but proper analysis is the only thing that separates an honest, professional qualitative study from a random amalgamation of conversations or online snapshots.

In April of last year, [this blog discussed one facet of Analyzability, i.e., verification](#). Verification, however, only comes after the researcher has conducted the all-important processing phase that converts qualitative data – that amalgamation of discrete elements – into meaningful connections that give rise to interpretations and implications, and the ultimate usefulness, of the research.

A quality approach to qualitative research design necessitates a well-thought-out plan for finding connections and making sense of the data. Here are six recommended steps in that process*:

- **Select the unit of analysis** – a subject matter, an activity, a complete narrative or interview.
- **Develop unique codes** – an iterative process utilizing a codebook that pays particular attention to context to derive explicit, closely-defined code designations.
- **Code** – a dynamic process that incorporates pretesting of codes, inter-coder checks, and coder retraining as necessary.
- **Identify categories** – a group of codes that share an underlying construct.
- **Identify themes or patterns** – by looking at the coding overall and the identified categories to reveal the essence of the outcomes. This is made easier by way of visual displays via various programs such as PowerPoint and CAQDAS**.
- **Draw interpretations and implications** – from scrutinizing the coded and categorized data as well as ancillary materials such as [reflexive journals](#), coders' coding forms (with their comments), and other supporting documents.

* Analyzability is one of four components of the Total Quality Framework. This framework and the six general steps in qualitative research analysis are discussed fully in *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller, M. R. & Lavrakas, P. J., 2015).

** Computer-assisted qualitative data analysis software, such as [nVivo](#), [Atlas.ti](#), [MAXQDA](#).

Image captured from: <http://www.breakthroughresults.co.uk/interim-management.php/>

A Qualitative Approach to Survey Research Design: Shedding Light on Survey Responses

April 29, 2015

In [“I Wonder About God’ & Other Poorly-Designed Questions”](#) (*Research Design Review*, July 25, 2012), it is argued that weak survey question design has a “potentially negative impact on analysis,



which in turn leads to wrong conclusions, which in turn leads end users along a path of misguided next steps.” As one of several examples, this article highlights the ambiguity embedded in [SurveyMonkey’s “The God Survey”](#); specifically, the problematic first question that asks how often “I wonder about God.” Poorly-designed questions raise serious concerns about how or *if* the researcher can legitimately analyze the resulting data (while also tackling issues of reliability and validity), a concern

made more profound by the frequent failure to *even consider* the alternative interpretations respondents may give to survey questions. By failing to recognize the analytical limitations associated with “questionable questions,” the survey data “will be ultimately swallowed up in an analytical black hole where the meanings respondents give to research questions are lost forever.”

The October 2014 article – [“Humanizing Survey Question Design with a Qualitative Touch”](#) – promotes the idea of using qualitative methods “to create user-friendly survey questions that speak *to* respondents rather than *at* respondents.” The point being that “utilizing qualitative sensitivities to unwrap the true purpose of survey questions while replacing corporate jargon with the way real people talk and think, humanizes the research ‘instrument’ which is a win-win for researchers and respondents.”

Equally important to the notion of integrating qualitative sensibilities in the question-development phase is the additional step of inserting measures of clarification in the survey interview/questionnaire itself. To illustrate, it was suggested in [this article](#) that [Pew Research](#)’s 2013 study asking about government surveillance could have benefited from “a simple add-on question at the end of the survey interview – such as, ‘Were you thinking of anything in particular when I asked you about the government’s surveillance programs?’ [IF YES] What were you thinking?’” – in order to “shed some light on the extent to which respondents were in sync with the researcher’s meaning [of government surveillance programs].” Shedding light on what respondents are actually thinking when responding to survey questions goes a long way to increasing the credibility and quality of survey research.

Fortunately there are researchers who have designed solutions and platforms specifically with the idea of marrying qualitative insight with quantitative survey design. [20|20 Research](#) is just one example of a provider whose technology enables the researcher to incorporate qualitative IDIs or group discussions with an online quantitative study and thereby add depth and *meaning* to survey responses. [iModerate](#) (utilizing their [ThoughtPath](#) approach), [Knowledge Networks](#) (via Qual^o Probe), and [Focus Pointe Global](#) (with its Quickconnect Onsite capability for central location testing) offer their own qualitative-quantitative integration solutions.

The question is: Why hasn't the idea of incorporating qualitative techniques with the survey research interview received greater attention; and, indeed, why hasn't a qualitative-quantitative approach become a best practice in survey research design? It doesn't take much looking around to find reports of survey findings that could use some clarification – some *justification* – to explain the purported conclusions from the data. It would be good, for instance, to understand why Hispanics in the [2014 Gallup-Lumina Poll](#) were much more likely to state that “education beyond high school is affordable to anyone in this country who needs it” rather than, as Gallup concludes, attribute their relatively high agreement to “greater optimism.” *Are* Hispanic people more “optimistic” on the affordability of higher education? And, if so, what exactly does it mean to harbor “greater optimism” and how do Hispanic respondents operationally define that? And, if optimism has nothing to do with their responses to that survey question, what *does* explain why more Hispanics believe in the affordability of higher education? The integration of a qualitative approach – that sheds light on the context and meaning of survey responses – is a useful and necessary condition to a quality research design.

Image captured from: <http://www.laboratoryequipment.com/news/2015/03/research-sheds-light-how-plants-control-themselves>

Helping Survey Data “Line Up”: Qualitative Lends a Hand

May 19, 2015

Last week at the [AAPOR 70th Annual Conference in Florida](#), Paul Lavrakas and I taught a “short course” on qualitative research design. The bulk of the class was spent on applying the unique constructs and techniques associated with the [Total Quality Framework \(TQF\)](#) to five qualitative research methods – in-depth interviews, focus group discussions, ethnography, qualitative content analysis, and case-centered research (i.e., case study and narrative research). But before jumping into the application of the TQF, we began by talking about the [distinctive attributes of qualitative research](#), particularly the emphasis on context and interconnectedness that is inherent in qualitative data. Indeed, we stressed the complexity – *the “messiness”* – of qualitative data collection and analysis, along with the unparalleled researcher skills (such as flexibility) needed to perform high-quality and ultimately useful qualitative research.



This course was one of a handful of discussions pertaining to qualitative research at a conference that is heavily weighted toward survey methods. As both a qualitative and quantitative researcher, it is interesting to sit in session after session, learning of the latest work in survey research, wearing both hats. Most striking in these presentations are survey researchers’ usual uncertainties and *frustrations* with the constructs they are trying to measure. This is not new. Survey researchers have always struggled with making heads or tails of their data, with the goal of producing data that near-perfectly aligns with respondents’ thinking (i.e., construct validity). One presenter expressed her attempts to achieve construct validity as “trying to get it all to line up.”

[Philip Brenner](#) – whose work has been discussed [elsewhere in this blog](#) – continues to look for “the perfect series of questions” that will account for the many ways people interpret “church attendance.” [Kristen Miller](#) is using various techniques to explore the “very subjective” construct of pain, i.e., the fact that there are varying interpretations of questions pertaining to “pain.” [Erica Yu](#) is concerned about relieving survey respondent burden but worries about the subjective nature of “burden” and how to define “perceived burden” – or what is “burdensome” – which would enable her to modify the questionnaire design to reduce this “burden.” And, [Josh Pasek](#), [Michael Schober](#), and others are exploring ways to link Twitter messages with survey data, forcing these researchers to make various assumptions in order to address uncertainties having to do with: how individuals use Twitter, tweeters’ true identities, and the “real” (subjective) meaning in their messages.

Which brings us back to qualitative research. As much as survey research serves many essential roles in our society and “we” are better for it, there are times when the obsession to “get it all to line up” – to neatly account for all interpretations of church attendance, pain, burden, and even our tweets – becomes a fool’s game. Without, that is, the help from qualitative inquiry. It would be useful, for instance, to add a qualitative component to quantitative studies that enabled respondents to explain their meaning throughout the survey by which respondents could be skipped to appropriate areas in the questionnaire.

Otherwise, a totally quantitative data-driven approach, that excludes a qualitative measure of how people think about the constructs of interest, will continue to leave survey researchers uncertain and frustrated as they go about the business of “trying to get it all to line up.”

Image captured from: <http://allisonbensonau.com/2014/06/16/section-80d-what-is-it-why-is-it-important-how-to-get-your-ducks-in-a-row/>

Working with Multiple Methods in Qualitative Research: 7 Unique Researcher Skills

May 30, 2015

There are certain types of qualitative research studies that employ more than one qualitative research method to explore a particular topic or phenomenon, i.e., the researcher uses multiple



research methods. These studies generally fall into the category of case study or narrative research, which are both designated by the label of “case-centered research.” The attributes that differentiate these forms of research from other qualitative approaches were discussed in an earlier *Research Design Review* post ([“Multi-method & Case-centered Research: When the Whole is Greater Than the Sum of its Parts”](#)).

These differentiating attributes are largely associated with the use of multiple methods to gain a complete understanding of complex subject matter. As stated in the post:

Multi-method research enables the qualitative researcher to study relatively complex entities or phenomena in a way that is holistic and retains meaning. The purpose is to tackle the research objective from all the methodological sides. Rather than pigeonholing the research into a series of IDIs, focus groups, or observations, the multi-method approach frees the researcher into total immersion with the subject matter.

A multi-method approach to conduct case-centered research requires sufficient time and resources – in terms of financial and human support – as well as unique skills on the part of the researcher. A researcher adept at single-method research – e.g., an IDI study to examine employee attitudes toward new company policies, a focus group study concerning the drinking habits among teenagers – is not necessarily equipped with the appropriate skills for conducting multi-method studies. Here are seven important skills required of the researcher who plans to use multiple methods to conduct case-centered – case study or narrative – research:

- Experience & expertise in different qualitative research methods – IDIs, group discussions, observation, content analysis.
- Exceptional organizational skills, e.g., the ability to coordinate/stage the various elements of the research design.
- Exceptional time management skills, e.g., the ability to allocate a reasonable time frame for each step.
- Wherewithal to obtain the necessary permissions to gain access to observation venues, activities, documents.
- Ability to relinquish control, allowing the case or the narrative to steer the direction of the investigation.
- Ability to accept many different points of view.
- Ability to notice the sequence of events as well as the physical & substantive context of information across all methods.

Image captured from: <http://www.dailyartmuse.com/2010/08/11/dryden-wells-ceramic-multiples-imply-movement/>

The Recipe for Quality Outcomes in Qualitative Research Includes a Healthy Dose of Consistency

June 15, 2015

The impact of bias (in various forms) on research outcomes is well-documented. In *Research Design Review* alone, there are many articles related to this issue; bias in the world of both



quantitative – such as [“Ask Someone a Question, You’ll Get an Answer”](#) and [“Accounting for Social Desirability Bias in Online Research”](#) – as well as purely qualitative – [“Selection Bias & Mobile Qualitative Research”](#) and [“Visual Cues & Bias in Qualitative Research”](#) – research. One of the more significant sources of bias in qualitative research is the researcher, i.e., the in-depth interviewer, focus group moderator, or observer in ethnography. This bias is specifically addressed in the *RDR* article [“Interviewer Bias & Reflexivity in Qualitative Research,”](#) which highlights the importance of the reflexive journal to help address “the bias that most assuredly

permeates the socially-dependent nature of qualitative research.”

An interviewer may bias research outcomes in any number of ways. For instance, he or she may allow personal beliefs or expectations to skew how questions are asked and/or responses are recorded. Or, the interviewer’s physical characteristics (e.g., associated with gender, race, ethnicity, as well as manner of dress and demeanor) may weaken the interviewer-interviewee relationship and an otherwise trusting research environment which is essential to gaining accurate and useful qualitative data.

It is not, however, only interviewer *bias* that can lead to distorted outcomes but also interviewer *inconsistency*. This is an important distinction. An interviewer that has *biased* the results has done something to provoke false information from the interviewee in response to the research questions. Interviewer *inconsistency*, on the other hand, does not lead to inaccurate information from the interviewee but rather variation in the data that does not truly exist. A researcher, for example, conducting face-to-face interviews with public school teachers about their use of electronic media in the classroom may do nothing to elicit erroneous information from the teachers yet produce data suggesting a wide range of media use when, in fact, this is not the reality. The researcher might do this by: 1) not specifying what is included under “electronic media” for some participants; 2) defining it as audio and video recordings and PowerPoint presentations for other participants; and 3) defining electronic media as audio/video recordings, slide presentations, the Internet, television, radio, phone, and computer devices for yet another set of participants. The interviewer’s inconsistent reference to “electronic media” will ultimately produce an unrealistic picture of what actually goes on in the classroom, a picture that suggests a greater variation in the use of electronic media than is true.

A classic example of the perils of inconsistency can be found in research intended to gain participants’ reactions to something new – such as a new product, service, or program. In order to gain an accurate measure of the viability of a new concept, it is critical that the interviewer or focus group moderator introduce this new idea by way of a prepared concept statement that is simple to

understand and void of any “sales talk.” This statement must consistently be read to all interviewees or group participants. If not – if some interviewees/participants are read a well-prepared descriptive statement while others are introduced to the new concept via the researcher’s off-the-cuff remarks – participants wind up reacting to different versions of the concept and, in the end, the researcher has no way of honestly knowing whether the proposed product, service, or program “has legs.”

Inconsistency also presents problems in observational research (i.e., ethnography). Consider an ethnographic study involving the observation of passengers at major train stations on the East Coast, with a particular focus on observations related to 1) passengers waiting for a train, 2) unexpected delays in the train schedules, and 3) passengers boarding a train. An observer who (due to fatigue or for other reasons) fails to consistently observe these three target scenarios – e.g., observes all three situations at some stations, passengers waiting and unexpected delays at other stations, and only passengers boarding at still other stations – jeopardizes the research outcomes and ultimately provides data of little value.

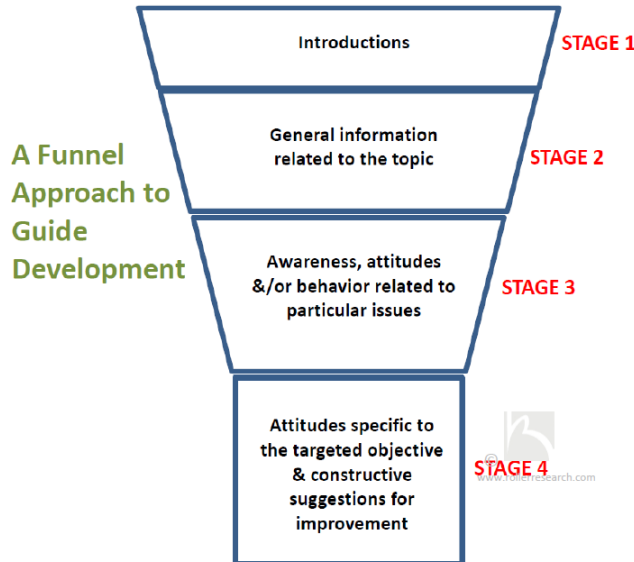
Let’s be clear. Qualitative research thrives on the flexibility and nimbleness of the researcher. This is an important quality that allows the researcher to reap all the complexity and context inherent in gaining meaning in qualitative research. But a good qualitative researcher understands that flexibility is not the same thing as an “anything goes” approach where no consideration is given to how the data are gathered. Like researcher bias, knowing when and how to avoid inconsistency – and add consistency – in data collection is an essential ingredient in the recipe for a quality qualitative research design.

Image captured from: <http://headache.answers.com>

Interview Guide Development: A 4-Stage “Funnel” Approach

June 28, 2015

In-depth interviewers and focus group moderators typically work from an outline of relevant topics



and questions that guides them through the interview or discussion. The guide is intended to be just that, a *guide*, and not a strict, prescriptive document. With the guide, the ultimate goal is to enable the interviewer or moderator to efficiently incorporate all of the issues that are important to achieving the research objectives. Maintaining clarity throughout the interview or discussion on the related issues is actually a more essential purpose of the guide than the actual questions or follow-up probes it may contain.

The most typical and effective approach in constructing an interview or discussion guide is to begin broadly and progressively narrow the topic area to the subject matter of greatest

importance to the research objectives, i.e., a “funnel” approach. The funnel consists of four basic stages.

Stage 1: Introductions

The interviewer or moderator introduces him/herself, briefly explains the purpose of the research, the use of audio/video recording, participant’s anonymity, etc., and allows the participant(s) to comment or ask questions.

The participant(s) introduce themselves by way of answering a few simple questions related to the research objective. For example, in a focus group study with new homeowners, the researcher might ask participants how they picked the home they did and one or two things they love about living there.

Stage 2: General information related to the topic

This stage provides background and context to the topic broadly defined, giving the researcher a necessary perspective from which to pursue certain questioning as well as conduct an informed analysis at the conclusion of the research. In the study with new homeowners, this stage might include a discussion about their attitudes toward the mortgage loan process.

Stage 3: Awareness, attitudes &/or behavior related to particular issues

At this stage, the interview or discussion begins to hone in on the ultimate objective of the research. Now, for instance, the new homeowners might be asked about their recall and attitudes toward the various mortgage documents (the *real* focus of the study) they reviewed and signed during the mortgage process.

Stage 4: Attitudes specific to the targeted objective & constructive suggestions for improvement

Aided by the relevant background and context provided in stages 1-3, the final stage of the funnel approach is when the researcher dives into the true “meat” of the interview or discussion. Using the study with new homeowners, this stage might ask about participants’ reactions to prototypes of re-formatted mortgage documents, asking them to compare these prototypes with those used in their mortgages, and asking for suggestions on how to improve the prototypes in order to better communicate with new borrowers.

A four-stage funnel approach is useful – efficient and effective – in creating one-on-one or group interview guides that lead researchers on a path toward reaching their objectives.

Lessons in Best Practices from Qualitative Research with Distinct Cultures

July 20, 2015

[Janette Brocklesby](#) recently wrote an article in [ORCA Views](#) magazine concerning the conduct of qualitative research with the Māori population of New Zealand. Specifically, she addresses the issue of whether “non- Māori researchers have the cultural competency, expertise and skills to undertake research with Māori.” Brocklesby makes the case in the affirmative, emphasizing that non- Māori qualitative researchers are “well equipped to undertake research with Māori and to convey the Māori perspective.”



In making her case, Brocklesby discusses many of the best practices mentioned repeatedly in *Research Design Review*. As for all qualitative research, a researcher studying Māori groups must place a high importance on:

Reflexivity – Continually questioning and contemplating the researcher’s role or impact on research outcomes is a critical step towards quality results. In March 2014, [an article in RDR](#) talked about using a [reflexive journal](#) to think about the assumptions, values, and beliefs that researchers bring to their fieldwork that potentially threaten the integrity of the data. Likewise, Brocklesby emphasizes the need for non- Māori researchers to reflect on and ask themselves questions such as, “How do I identify with New Zealand and how am I the same as and different from Māori?”

Complexity – Important to understanding another culture is the ability to delve into the complexity of personal meaning as it relates to the research participants. As discussed in [this RDR article concerning social constructionism](#) (as well as other posts throughout this blog), the human experience is defined (and complicated) by the interconnections of life’s facets. That personal meaning – even within a distinct culture – may vary greatly. In this respect, Brocklesby asserts that researchers must “make no assumptions about what being Māori means to people.” Qualitative researchers embrace the complexity of personal meaning.

Context – Context is king in qualitative research, and a topic discussed throughout *RDR*, e.g., [context in observational research](#). Context, like complexity, is particularly important when studying a unique culture. In the Māori culture, for instance, it is essential to provide the necessary time for introductions in order to gain an understanding of personal identity which serves as the context that will ultimately shape research outcomes. Personal identity lurks as context in all qualitative research; a context that, unfortunately, is too often ignored and unexplored in less culturally-oriented qualitative studies.

Flexibility – [A unique quality of qualitative research is flexibility](#). This quality manifests itself in many ways, including the researcher’s ability to adjust the research design as appropriate during the course of the field period. Brocklesby emphasizes this point when she mentions the need, for

example, to include family members in research with Māori, as well as the probability of having to reschedule and respecting local customs.

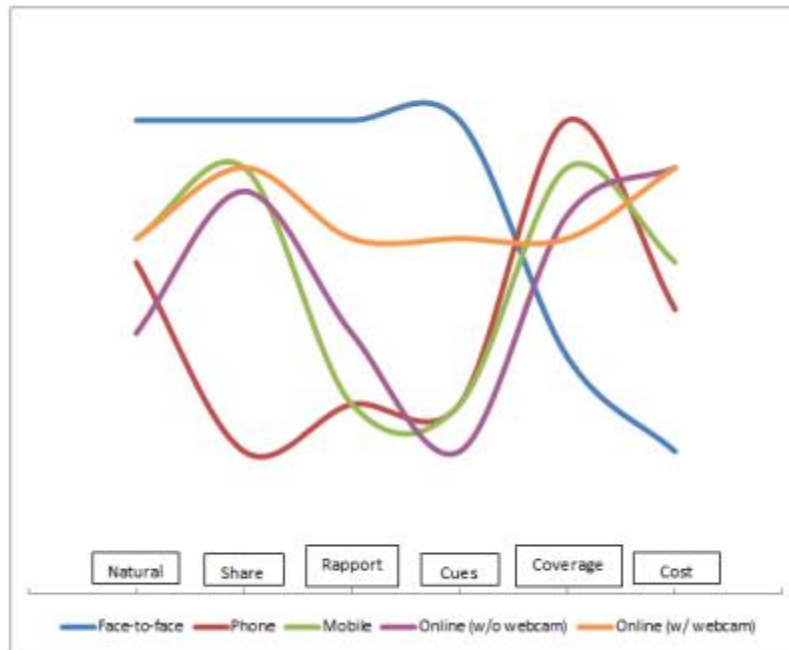
These four attributes – reflexivity, complexity, context, and flexibility – are important to conducting meaningful research with Māori, yet equally important in the design of all qualitative research. Research with distinct cultures offers a useful lesson in why and how to implement best practices in qualitative research design.

Image captured from: <https://www.koruc computing.com/>

The Relative Value of Modes

August 15, 2015

The cadre of modes available to researchers as they design their studies has grown hugely over the past decade. When researchers once had few choices – relying on face-to-face, landline phone, and mail – they now need to think carefully as they sift through an increasing number of options. In addition to the old standbys, other viable, and often preferable, modes must be considered, including mobile phone, online (without webcam use), and online (with webcam use).



- **“Natural”** characteristics, i.e., its ability to foster a natural, social conversation environment.
- The ability to **share** content, e.g., photos, video, documents.
- **Rapport** building, i.e., its ability to foster researcher-participant rapport.
- The ability to identify **cues** – verbal and non-verbal – that provide insights beyond direct responses.
- **Coverage**, i.e., the breadth and depth of geography and the population segment the mode can reach.
- **Cost**, i.e., the total cost of the study attributable to the mode.

There are, of course, other considerations – such as, convenience, depth of response, and so on – but the six listed are certainly important.

Using these considerations, it can be helpful to visualize the relative value of the five modes mentioned – face-to-face, phone (landline), mobile, online (without webcam), and online (with webcam). Although the relative value may vary from study to study, there is a general nature associated with each mode that can reveal its relative worth.

The image shown provides a loose idea of where each mode falls in relationship to others across the six considerations outlined above. The face-to-face mode, for instance, is a relatively great choice when it comes to fostering a natural environment where the researcher can build rapport, pick up on

verbal/non-verbal cues, and enable the participant to share; but not a great option considering the (sometimes) limited ability to actually reach the target participant and to do so in a cost effective manner. In fact, all of the other modes outperform face-to-face methods in terms of coverage and cost. Overall, the online (with webcam) mode does a relatively good job across all considerations.

Should Qualitative Research Be Taken Seriously?

September 10, 2015

The [Qualitative Methods in Psychology section](#) (QMIP) of the British Psychological Society held its annual conference in Cambridge, England last week. It was a conference packed with varied and insightful presentations, workshops, and symposia covering such topics as: using conversation analysis to understand online communication, [pluralism in qualitative research](#), visual methods such as photo-elicitation interviewing, the emotional demands associated with conducting phenomenological research, and discourse analysis of the media coverage of the conflict in Gaza.

In many instances the presenter's focus was on the outcomes, e.g., what was learned after conducting a certain number of interviews, with little attention to the research design. This attention on the outcomes was to the exclusion of the path by which the outcomes were derived, i.e., the research process.

Exploring the lived experiences among victims of brain injuries, or the life stories of women who have experienced failed pregnancies, or the identities associated with living with HIV, are important issues worthy of serious research efforts. And yet, qualitative studies that emphasize outcomes, while ignoring the details of how the data was collected and analyzed, feel almost anecdotal in nature, not significant research endeavors.

Which begs the questions: With the downplaying of the research process, should qualitative research be taken seriously? And, is the failure to critically discuss how qualitative researchers obtain their conclusions responsible for the second-class status given to qualitative research among many positivists, quantitative thinkers?

The QMiP conference also included keynote presentations by [Paul Flowers](#) of Glasgow Caledonian University as well as [Virginia Braun](#) from the University of Auckland. Both presentations zeroed-in on the need to heighten qualitative researchers' attention to quality aspects of the research process. Dr. Flowers talked about issues related to "how well the data collection was carried out," the need for transparency, and constructing qualitative research that leads to "useful outcomes." Dr. Braun emphasized important quality components to the qualitative research process, such as "critical reflexivity," the need to rationalize sample size (beyond the [grounded theory notion of saturation](#)), and the short-sightedness of relying on computer-assisted qualitative data analysis software (e.g., NVivo, MAXQDA, Atlas.ti, etc.) for the analysis of qualitative data.

These psychologists and others are helping qualitative researchers move forward towards qualitative studies that represent, not just the exploration of "interesting stuff" but rather, serious research efforts worthy of attention.

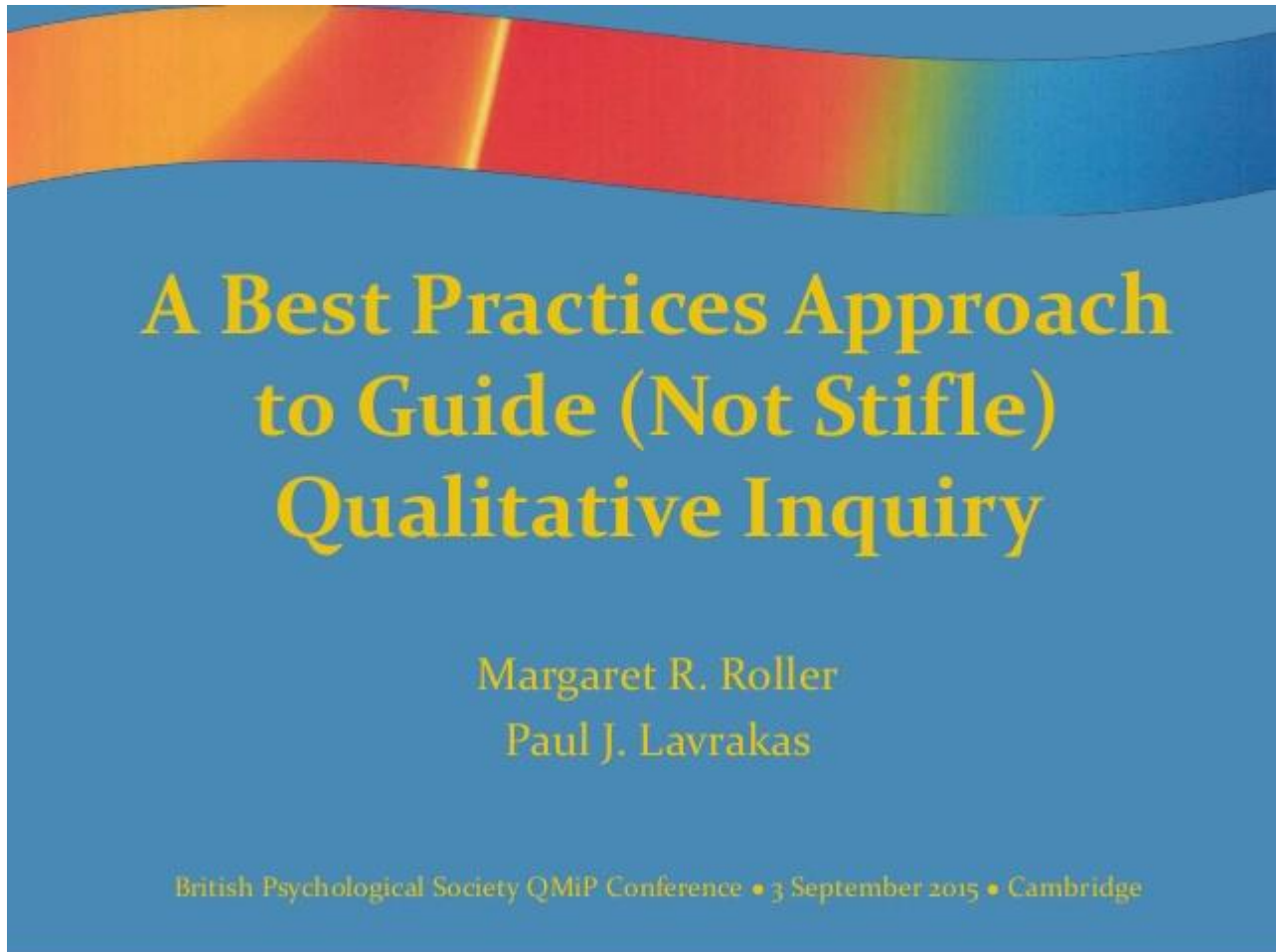
Image captured from: <http://www.coledigitalmarketing.com/blog/bid/340637/Mortgage-Leads-Are-Your-Lead-Nurturing-Emails-Worthy-of-Attention>



A Best Practices Approach to Guide (Not Stifle) Qualitative Inquiry

September 23, 2015

Click the image below to view this presentation in SlideShare.



Using a “Design Display” to Guide Qualitative Research Design

October 31, 2015

An important lesson in research design is the idea of learning from past research in order to not repeat the “mistakes” from comparable research in a given area. In qualitative research, if recruiting participants via email has reaped mediocre levels of response and cooperation in the past, a different recruiting strategy (e.g., personal letters by way of FedEx followed by phone) would be adopted for future studies with this population segment. And, if a particular moderating technique has not resulted in a dynamic and open focus group discussion on a certain topic, the researcher will dig deeper next time into the proverbial “toolbox” to find a more effective approach.

To facilitate the design process, while keeping in mind what has “worked” and “not worked” in the past, it is useful to create some type of grid or display of earlier research. This grid might include the researcher’s own work in the particular area of interest as well as that of others’ research published in peer-reviewed journals. For each study cited, the researcher’s display should include information pertaining to effective as well as ineffective elements of data collection. [NOTE: Similar grids could be developed relating to analysis and reporting.] For instance, a display looking at sampling and recruitment for face-to-face focus group research with cancer patients or survivors might look something like this: [NOTE: Click on image to enlarge]

Reference	Sampling	Recruitment
Brown et al., 2011	Purposive. Oncologists provided random samples of their patients. <u>Benefit:</u> All listed patients qualified. <u>Drawback:</u> Not all physicians had “enough” patients to fulfill research goal.	Letter via USPS with return form for anyone <i>not</i> wanting to participate, followed by phone call. <u>Benefit:</u> Efficient way to identify patients unwilling to participate. <u>Drawback:</u> Unable to contact everyone by phone, half refused, & 15% did not show up for the discussion.
Ferrell et al., 1997	Convenience. Referrals from NCI cancer center. <u>Benefit:</u> Easy access to qualified patients. <u>Drawback:</u> Convenience sampling may result in an unrepresentative sample threatening study quality.	Individual in-depth interviews followed by an invitation to participate in a focus group. <u>Benefit:</u> Ability to engage and gain rapport with patients prior to the focus group. <u>Drawback:</u> Half of the IDI participants dropped out (did not participate in the focus group) & additional “friends” needed to be recruited.
Frazier et al., 2010	Purposive. Efforts of health professionals at oncology clinics at college campuses. <u>Benefit:</u> Targeted efforts resulted in qualified cancer survivors. <u>Drawback:</u> Deriving sample list relied on specific recruitment channels that may not have reached target group.	Health professionals distributed flyers regarding the study. Additionally, participants were recruited via notices in local newspapers, an Internet message board, and word of mouth. <u>Benefit:</u> Multiple channels of communication allowed for a broader field of cancer survivors to draw from compared to just one method. Also, for convenience, cancer survivors were offered the option of participating via phone. This flexibility in approach improves recruitment success. <u>Drawback:</u> While broad in scope, the particular communication channels used may not have effectively reached a representative group of the target survivor population.

By expanding the display and allowing it to guide the design process, the qualitative researcher can efficiently develop qualitative studies that build on past successes and result in useful outcomes.

Brown, R. F., Shuk, E., Leigh, N., Butow, P., Ostroff, J., Edgerson, S., & Tattersall, M. (2011). Enhancing decision making about participation in cancer clinical trials: Development of a question prompt list. *Supportive Care in Cancer, 19*(8), 1227–1238.

Ferrell, B. R., Grant, M. M., Funk, B., Otis-Green, S., & Garcia, N. (1997). Quality of life in breast cancer survivors as identified by focus groups. *Psycho-Oncology, 6*(1), 13–23.

Frazier, L. M., Miller, V. A., Horbelt, D. V., Delmore, J. E., Miller, B. E., & Paschal, A. M. (2010). Comparison of focus groups on cancer and employment conducted face to face or by telephone. *Qualitative Health Research, 20*(5), 617–627.

Weighing the Value of Qualitative Research Outcomes

November 22, 2015

Is all qualitative research of equal value? Are the findings derived from one focus group study just as useful as those obtained from another focus group study? Are the outcomes from observational research or in-depth interviews (IDIs) valuable regardless of the design peculiarities (i.e., how the research was conducted)?



More specifically, what are the strengths and limitations of the design elements that inform the usefulness of research outcomes? Was the research objective and approach well-conceived, realistic? What was the sampling method? How was recruitment conducted? What procedures were in place to maximize cooperation and rapport, and minimize nonresponse? Was the moderator/observer/interviewer guide carefully thought out and designed to achieve the research objective (e.g., using a [funnel approach](#) to develop a moderator's outline)? Is it clear how the researcher conducted the analysis? Were the analytical processing and verification techniques appropriate, thorough, and inclusive of researcher reflexivity? And are the final interpretations and implications drawn from the research warranted given the strengths and limitations of the design elements, i.e., how the research was conducted?

These are the kinds of questions that all users of qualitative research – e.g., the research sponsors, the people who ultimately implement the findings, other researchers who hope to utilize the research design in other contexts – should be asking. The answers to these questions are important, not to unequivocally “accept” or “reject” the research but rather, to derive some level of confidence in the outcomes. In this way, the value of the research can be weighed, allowing the user of the research to determine how much importance to place on the findings.

The ability to make this determination is something that should be granted to anyone who has some reason to engage with a qualitative research study. This is why it behooves researchers to take the initiative and provide the details that users need to gauge the value of research outcomes. Researchers can do this by including a discussion in the final research document of the strengths and limitations of the design elements. This discussion can be facilitated by employing a series of criteria by which each design element is considered, and the reliability and validity of the research can be evaluated. For instance, not unlike the [“design display”](#) that helps to examine research found in the literature, the researcher can create a “quality display” that dissects different aspects of a study's design by the four components of the Total Quality Framework*, i.e., Credibility, Analyzability, Transparency, and Usefulness. A quality display for an IDI study with recent college graduates might look something like the following:

	Credibility Completeness & accuracy of the data	Analyzability Completeness & accuracy of analysis & interpretations	Transparency Completeness & disclosure in the final document	Usefulness Ability to do something with the outcomes
Strengths	<p>Participants were systematically drawn from a complete list of the target group.</p> <p>The number of completions was determined using the 10 questions for evaluation.*</p> <p>Many techniques were used to gain rapport.</p>	<p>Transcriptions were created by qualified transcriptionists who were familiar with the language/terminology used by the participants.</p> <p>Analyses of interviewers' reflexive journals were included in the analysis scheme.</p>	<p>Most of the details of the research design are included in the final document, such as sampling, guide development, & the analytical process.</p>	<p>New insights were uncovered regarding college graduates' expectations & prospects for the future.</p>
Limitations	<p>Time & resources prevented sufficient follow up reminders which led to many "no shows" & potentially biased the sample.</p>	<p>Audio recordings failed on five occasions & the interviewers' notes for those IDIs were not complete.</p> <p>Only one coder was used in the coding process & time did not allow verification of the coder's work.</p>	<p>Details pertaining to recruitment, interviewers' skills & techniques, thoroughness of each IDI, & verification are not available.</p>	<p>Due to the number of "no shows," study participants skewed towards Caucasian men. The research provided little or no insights relevant to women and Hispanic college graduates.</p>

Quality display based on the four components of the Total Quality Framework (Roller & Lavrakas, 2015. *Applied Qualitative Research Design: A Total Quality Framework Approach*)

With the quality display, researchers empower the users of their studies to decide for themselves their sense of confidence in the outcomes and weigh the value of the research for their own purposes.

*See: [Roller, Margaret R., & Lavrakas, Paul J. \(2015\). *Applied Qualitative Research Design: A Total Quality Framework Approach*. New York: Guilford Press.](#)

Image captured from: http://www.wpclipart.com/holiday/election_Day/scales/scales_4.png.html

A Quality Approach to the Qualitative Research Proposal

December 12, 2015

The articles in *Research Design Review* are largely devoted to issues of “quality research design”; specifically, how to build sound research techniques and principles into the design of qualitative and quantitative studies. Creating designs that lead to useful, actionable outcomes is the ultimate goal of research, yet most meaningful research would not get off the ground without a well-reasoned, well-written research proposal. This is why a quality approach to developing the research proposal is essential among researchers in the academic, government, not-for-profit, and commercial sectors responding to RFPs; researchers in search of grant funding; as well as graduate students working toward their theses and dissertations.



A quality approach is particularly important with respect to the *qualitative* research proposal. While quantitative proposals typically incorporate any number of discussions on quality issues that directly or indirectly justify the proposed study, attention is less frequently given to these considerations in the qualitative proposal.

Preparing a qualitative research proposal around pertinent quality issues requires critical thinking skills aided by a basis with which to examine aspects that potentially may impact the quality of outcomes. One such basis is the Total Quality Framework^{*} (TQF) which offers the qualitative researcher various design parameters to consider related to Credibility (data collection), Analyzability (analysis), Transparency (reporting), and Usefulness (next steps). What differentiates the TQF proposal from other proposal formats is the central role that quality design issues play *throughout* the proposal.

There are eight sections to the TQF proposal.

1. Introduction: A brief overview that sets the stage for the proposed approach, including the topic and particular research question(s) being addressed, how the proposed study will advance thinking in this area, the fundamental methodological approach(es), and, importantly, the priority that will be given to incorporating quality measures via the TQF.

2. Background & Literature Review: A discussion of the population segment of interest as well as earlier research that has been conducted by the sponsoring organization (if appropriate) and research published in professional literature and/or presented at professional conferences. Importantly, the literature review should weigh heavily the reliability and validity of compatible research, i.e., the quality standards that were integrated into the research design. A “Literature Review Reference Summary Evaluation Table”^{**} – that organizes past studies and lays out the strengths and limitations

of each as it relates to the TQF – can be very useful for this purpose. This section is essential to providing the necessary context for the researcher’s proposed approach.

3. Research Questions or Hypotheses: The proposal author not only states the specific questions or hypotheses that are the objectives of the research but also explains *why* these questions/hypotheses merit investigation. Based on the review of earlier research in section #2, these questions/hypotheses may be both substantive and methodological, whereby the proposed research is expected to avoid the quality flaws (as defined by the TQF) of prior studies.

4. Research Design: A detailed account of each aspect of the research design from a quality perspective. Because every key aspect of the design has some role in the quality of research outcomes, the proposal should explicitly discuss elements of the TQF throughout this section. The broad areas covered are: method and mode, scope and data gathering, analysis, ethical considerations, and dissemination of findings.

5. Research Team: A discussion of the researcher and other members of the research team. This consists of: each team member’s name (if appropriate), title, and affiliation; the basis by which each team member was chosen, including his/her experience and knowledge of the subject matter and/or population segment as well as skills; the role each team member will play in conducting the research; and the principal researcher’s philosophical or theoretical orientation (as appropriate) and its impact on how the study will be conducted. Importantly, this section highlights how the research team will ensure credibility in the data collected, completeness and accuracy of the data analysis and interpretation, the transparency of the final deliverables, and usefulness of the research outcomes.

6. Research Deliverables: A description of the documents and details that will be included at the conclusion of the proposed research. An example of what this might include is discussed in [25 Ingredients to “Thicken” Description & Enrich Transparency in Ethnography](#). This section emphasizes the value in transparency as a fundamental component of the TQF and how the documents/details that will be included in the final deliverables will provide the users of the research with a clear and accurate account of what occurred.

7. Limitations of the Proposed Research: A critique of the proposed research from a quality standpoint, i.e., a TQF perspective. By acknowledging the imperfections in the proposed study, the author takes the “high road” and strengthens the idea that the proposed approach is the “best” one given the available resources, and demonstrates that the researcher will fully account for these limitations when drawing final interpretations of the data.

8. Research Schedule & Cost Estimate: The proposed schedule and cost estimate are outlined with special mention given to the necessary time and costs associated with the TQF research approach. This section outlines the scheduling and cost considerations related to such matters as: obtaining quality lists to sample participants, the ease or difficulty in gaining cooperation from participants, training (e.g., for data collection and analysis), verification procedures, and compiling the final deliverables.

*See: [Roller, Margaret R., & Lavrakas, Paul J. \(2015\). *Applied Qualitative Research Design: A Total Quality Framework Approach*. New York: Guilford Press.](#)