Some overarching features of qualitative methods

- Permits study/observation of individuals in their natural setting
- Employs flexible methods that allow new concepts to emerge and be developed through the data collection and analytic process—*a priori* knowledge of the subject not required
- Uses text/stories as a way of expressing/developing a narrative account
- Focuses on language use in social settings/observation of social interactions, expressions of culture
- Addresses issues of subjectivity, intersubjectivity, transparency, and agency/definitions of self
- Allows for competing accounts; disputes notion of a single, universal "truth"
  - ➢ Truth conceptualized more along the Greek definition of *alethia* – to bring to light vs. the Roman definition of *veritas* – the opposite of lies/moral wrongs

Applications in research

- Address "why," "in what ways," "under what circumstances" and "how" questions
- Explore a new subject where little previous knowledge exists—good descriptive studies to begin understanding the problem/issue
- Extend research to new populations, different cultures
- Follow up on population studies to gain a deeper understanding of the phenomenon
- "Unpack" an intervention: What is it about this intervention that works, for whom, in what circumstances, in what respects, and why?
- Use in questionnaire development to understand how potential study populations think about issues, understand, use and interpret language, and assign meaning
- Understand the lived experience of individuals and groups
- Explore issues of culture and context to explain attitudes, perceptions, behaviors
- Examine language/discourse for evidence of power relationships, systems factors
- Develop theory, conceptual models

Methodologic Issues

- **Questions of story, framing, and motivations**
  Before data collection begins
  - ➢ What story do you want to explore?
  - ➢ What interests you and motivates your research questions?

  During data collection
  - ➢ How do your interests and experience shape:
    - the kinds of questions/probes you will ask in interviews?
    - the actions/events you witness/perceive in participant observation?
    - the records/policies you choose to analyze?

  During analysis
  - ➢ What captures your attention? Why?
  - ➢ What surprises you? Why?

  During write up
  - ➢ Who is your audience?
  - ➢ What story do you want to convey to them? From whose perspective (yours? your participants? combination?)
  - ➢ What method/presentation style will be most effective, given your audience's expectations, training, and experience with these kinds of data/reports?

Thinking Qualitatively

Method/Tradition	Historical Roots	Types of Questions Addressed	Data Sources	Products
Ethnography	Anthropology	Understanding cultural contexts and interactions; acquired /constructed meanings	Observations, interviews, documents/archives, field notes	Rich descriptions of cultural practices/norms for/of social interaction
Phenomenology	European Philosophy	What is the lived experience of _____?	Interviews with those who have experienced the phenomenon, interviewer memos documenting reflections	Rich descriptions of what it means to experience the phenomenon. Reader is left with an understanding of what it must be like.
Grounded Theory	Sociology	What are the conditions/patterns that explain/predict the observed behaviors/outcomes?	Interviews with those who have experienced the phenomenon under different conditions	Generate theory from the range of the participants' experience
Hermeneutics	European Philosophy	How do people/groups come to a shared understanding of a phenomenon or event? How did they learn to "talk" the way they do?	Text analyses, media, conversations, interviews with those with diverse experiences to get to shared understanding	Thematic emphasis on shared understanding, meaning, and interpretation
Narrative Analysis	Literary Criticism	How are stories constructed?	Text analyses, media, conversations, interviews, novels, film	Conceptual/thematic descriptions of narrative structure, cultural values
Discourse Analysis	Linguistics/ Communications	How does language accomplish its tasks? How is significance created? What identities, activities, and relationships are constructed and enacted through language? How is this language connected to other Discourses (or social conversations)?	Text analyses, media, conversations, interviews, speeches/rhetoric	Examines "texts" for power relationships, ideology, and social dynamics. Exposes the dominant/normalized ideologies that are understood as "common sense"
Conversation Analysis	Sociology	Examines talk-in-interaction	Everyday conversations, media, novels	Examines what is it that speakers *do* when they talk; what is accomplished in their conversation.

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- **Position and voice**
  - ➢ How and where do you situate yourself in the story/research?
  - ➢ What motivates your participants to be involved? How does that shape the stories they tell?
  - ➢ When you re-tell the story, who are you speaking as and who are you speaking for?

- **Subjectivity/Intersubjectivity**
  - ➢ Cartesian assumption that people know themselves well and have clear and accurate self-knowledge; we as humans can gaze inward and know and recognize who we are and what we see. We have self-knowledge through reflection on what is already there within us.
  - ➢ Post-modern/post-structuralist views questions this view and posit that subjectivity is constructed through language and social interactions. All self-knowledge is socially constructed: People come to know themselves by their place in history (time, place, family, culture) and what is acknowledged/recognized in them by others.

- **Transparency of language of both researchers and respondents**
  - ➢ When researchers speak, their questions and intentions are transparent and clear, both to themselves and to their respondents. Likewise, when respondents speak, they are able to accurately convey their self-knowledge through their stories, and these stories are a true reflection of their inner selves.
  - ➢ At issue is whether the words (signifiers) used in interactions have the same meanings (signifieds) for all. Many times participants in the same conversation do not share the same meanings and language is not transparent to either one. Rather, meaning is co-constructed.

- **Rigor**
  - ➢ The analyst *is* the instrument—all data are interpreted/filtered through the analyst
  - ➢ Tensions between rigor and creativity: interpretation draws on analyst's previous knowledge and experience to identify concepts and linkages. Coding procedures guide the analysis but cannot be dissociated from the analyst.
  - ➢ Writing memos is one technique used to document the evolution of the analyst's reflection and synthesis. Memos also create an audit trail for how the analyst's thoughts changed over time. These can vary from the theoretical to the personal, documenting the perspective, impressions, and feelings of the analyst as s/he is immersed in the data.
  - ➢ Multiple coders reviewing the same material increases trustworthiness: People with different perspectives/experience/training are picking up similar things and interpreting them in similar ways and/or lend multiple interpretations to the same phenomenon, exploring linkages.
  - ➢ Triangulating data sources is another way to identify/verify constructs. This can be done with the same participants answering different kinds of questions (e.g., survey, focus group, individual interview) or different participants addressing the same phenomenon (e.g., patients/family members/clinicians talking about a clinical encounter).

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- **Interviewing**
  - ➢ Interview style is directly related to analytic method and expected product. How structured do you need to be? What do you hope to learn? Is there room for surprises?
  - ➢ What format to use: one-on-one, focus groups (usually strangers), intimate group (e.g. couples).
  - ➢ In-person vs. telephone: depends on questions of logistics (travel, busyness), sensitivity of the topic, rapport, and desire for reciprocity of information between respondent and interviewer.
  - ➢ 'Ping-pong' interviewing (brief exchanges back and forth between interviewer and respondent) rarely yields rich data. However, can be very useful for targeted, fact-finding.
  - ➢ The best data are often answers to questions that respondents volunteer. Try to build in opportunities for spontaneity.
  - ➢ When a respondent starts down a tangent, don't be in too much of a hurry to get them back on track. They're going there for a reason but it may not be obvious—to them or you—why they're telling you THAT story. If it's not, you can ask afterwards what made them tell that story.

- **Coding/analysis**
  - ➢ Data reduction and management. All coding is analytic but different passes through the data serve different analytic functions. The objective is to allow you to categorize, analyze, and synthesize your material.
    - ▪ First pass: Read/listen with an open mind. Get the story in its entirety before you start making too many judgments
    - ▪ Second pass: Begin to categorize/organize the data. Two camps: Lumpers and splitters. My preference is to lump first and split later. Software programs are very helpful at this stage as they help with data management and retrieval for later analysis.
    - ▪ Third pass: How you do this next step depends heavily on your analytic method. I tend to extract codes across cases and re-read to do the next level of analysis.
  - ➢ How/what you code depends on your analytic method. Examples:
    - ▪ Content analysis: what response categories are given to specific questions (e.g., barriers and facilitators to implementing a clinical protocol/educational intervention)
    - ▪ Theme development/descriptive analysis: what topics are mentioned in response to broad questions (e.g., about experiences, behaviors, attitudes)
    - ▪ Narrative analysis: what words/language do people use to convey their thoughts/experiences? How do these word choices link these individuals to their communities/constituencies? What is the choice of language "doing" for them (i.e., why the use of street slang vs. academese?)
    - ▪ Phenomenology: how do people express their lived experience and what that means to them? What aspects of the personal embodied experience speak to a more generalized human experience?

- **Write-up**
  - ➢ Determine your audience. Who are you writing for and why should they care?
  - ➢ Establish the purpose: What do you want this work to do? Impact policy or practice? Educate? Describe a new phenomenon? Provide domains and language for a structured survey?
  - ➢ What will the product of this research look like? Where would you situate the results on the continuum: No findings, Topical survey, Thematic survey, Conceptual/thematic description, Interpretive explanation