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Introduction to Qualitative Research

Sharan B. Merriam

Drawing from a long tradition in anthropology, sociology, and clinical psychology, qualitative research has, in the last twenty years, achieved status and visibility in the social sciences and helping professions. Reports of qualitative research studies can be found at conferences, on the World Wide Web, and in journals in social work, nursing, counseling, family relations, administration, health, community services, management, all subfields of education, and even medicine. In addition, there are numerous methodological texts on qualitative research available in fields as disparate as gerontology (Reinharz & Rowles, 1988) and organizational science and management (Lee, 1999).

What is the nature of qualitative inquiry that it has captured the attention of so many? The purpose of this chapter is to explain what qualitative research is, how it differs from the more familiar positivist or quantitative research, what variations exist within the qualitative paradigm itself, and how one goes about conducting a qualitative study. This chapter and the following chapter on evaluating and assessing qualitative research offer the backdrop for exploring the collection of qualitative studies and author commentaries that follow.

The Nature of Qualitative Research

The key to understanding qualitative research lies with the idea that meaning is socially constructed by individuals in interaction with their world. The world, or reality, is not the fixed, single, agreed upon, or measurable phenomenon that it is assumed to be in positivist, quantitative research. Instead, there are multiple

constructions and interpretations of reality that are in flux and that change over time. Qualitative researchers are interested in understanding what those interpretations are at a particular point in time and in a particular context. Learning how individuals experience and interact with their social world, the meaning it has for them, is considered an *interpretive* qualitative approach. If you were interested in studying the placement of a child in foster care, for example, you might focus on understanding the experience from the perspective of the child, the foster family, the agency involved, or all three.

Drawing from critical social theory, you might also investigate how the social and political aspects of the situation shape the reality; that is, how larger contextual factors affect the ways in which individuals construct reality. This would be a *critical* qualitative approach. Using the same example of placement of a child in foster care, from a critical qualitative perspective you would be interested in how the social institution of the placement agency, or the foster family, is structured such that the interests of some members and classes of society are served and perpetuated at the expense of others. Whose interests are being served by this placement? How do power, privilege, and oppression play out? Critical social science research has its own variations. Much of feminist research draws from critical theory, as does participatory or participatory action research, a form of research that involves participants in the design and implementation of a study. Some critical research incorporates a strong emancipatory agenda along with critique; that is, the overall objective is to empower participants in the process of conducting the investigation.

Another, more recent, philosophical stance is called *postmodern* or *poststructural.* Here researchers question all aspects of the construction of reality, what it is and what it is not, how it is organized, and so on. As Bruner (1993, p. 1) writes, meaning is "radically plural, always open, and . . . politics [is] in every account." For example, a poststructural inquiry would question and "disrupt" the dichotomies (for example foster-nonfoster family, child-adult) inherent in the research problem above. Lather (1992) lays out these three overarching theoretical perspectives in terms of *understanding* (interpretive), *emancipation* (critical and feminist are included here), and *deconstruction* (postmodern). Although I have included examples of critical and postmodern studies in this volume, the emphasis is on *interpretive* qualitative research studies.

As a qualitative researcher, you can approach an investigation from any of the philosophical or theoretical stances outlined above. Your particular stance will determine the specific research design that you employ for actually carrying out your study. If your primary interest is in understanding a phenomenon, you have many options, the most common being grounded theory, phenomenology, narrative, ethnography, case study, or just a basic interpretive study. Critical, feminist, postmodern, and participatory studies all have goals that include but go beyond understanding.

Several key characteristics cut across the various *interpretive* qualitative research designs (also called forms, types, or genres by various authors). The first characteristic is that researchers strive to *understand the meaning* people have

constructed about their world and their experiences; that is, how do people make sense of their experience? As Patton (1985, p. 1) explains: Qualitative research "is an effort to understand situations in their uniqueness as part of a particular context and the interactions there. This understanding is an end in itself, so that it is not attempting to predict what may happen in the future necessarily, but to understand the nature of that setting—what it means for participants to be in that setting, what their lives are like, what's going on for them, what their meanings are, what the world looks like in that particular setting. . . . The analysis strives for depth of understanding."

A second characteristic of all forms of qualitative research is that *the researcher is the primary instrument* for data collection and data analysis. Since understanding is the goal of this research, the human instrument, which is able to be immediately responsive and adaptive, would seem to be the ideal means of collecting and analyzing data. Other advantages are that the researcher can expand his or her understanding through nonverbal as well as verbal communication, process information (data) immediately, clarify and summarize material, check with respondents for accuracy of interpretation, and explore unusual or unanticipated responses.

However, the human instrument has shortcomings and biases that might have an impact on the study. Rather than trying to eliminate these biases or "subjectivities," it is important to identify them and monitor them as to how they may be shaping the collection and interpretation of data. Peshkin (1988, p. 18) goes so far as to make the case that one's subjectivities "can be seen as virtuous, for it is the basis of researchers making a distinctive contribution, one that results from the unique configuration of their personal qualities joined to the data they have collected."

Often qualitative researchers undertake a qualitative study because there is a lack of theory or an existing theory fails to adequately explain a phenomenon. Therefore, another important characteristic of qualitative research is that the process is *inductive*; that is, researchers gather data to build concepts, hypotheses, or theories rather than deductively deriving postulates or hypotheses to be tested (as in positivist research). In attempting to understand the meaning a phenomenon has for those involved, qualitative researchers build toward theory from observations and intuitive understandings gleaned from being in the field. Typically, findings inductively derived from the data in a qualitative study are in the form of themes, categories, typologies, concepts, tentative hypotheses, and even substantive theory.

Finally, the product of a qualitative inquiry is *richly descriptive.* Words and pictures rather than numbers are used to convey what the researcher has learned about a phenomenon. There are likely to be descriptions of the context, the participants involved, the activities of interest. In addition, data in the form of quotes from documents, field notes, and participant interviews, excerpts from videotapes, electronic communication, or a combination thereof are always included in support of the findings of the study. These quotes and excerpts contribute to the descriptive nature of qualitative research.

In summary, qualitative research attempts to understand and make sense of phenomena from the participant's perspective. The researcher can approach the phenomenon from an interpretive, critical, or postmodern stance. All qualitative research is characterized by the search for meaning and understanding, the researcher as the primary instrument of data collection and analysis, an inductive investigative strategy, and a richly descriptive end product.

Distinguishing Among Types of Qualitative Research

From education to anthropology to management science, researchers, students, and practitioners are conducting qualitative studies. It is not surprising, then, that different disciplines and fields ask different questions and have evolved somewhat different strategies and procedures. Writers of qualitative texts have organized the diversity of forms of qualitative research in various ways. Patton (1990), for example, presents ten orientations to qualitative research according to the different kinds of questions researchers from different disciplines might ask. Creswell (1998) has identified five "traditions"—biography, phenomenology, grounded theory, ethnography, and case study. Tesch (1990) lists forty-five approaches divided into designs (for example, case study), data analysis techniques (for example, discourse analysis), and disciplinary orientation (for example, ethnography). Denzin and Lincoln (2000) identify eight research strategies of case study, ethnography, phenomenology, grounded theory, biographical, historical, participatory, and clinical. They write that qualitative research "does not belong to a single discipline. Nor does qualitative research have a distinct set of methods that are entirely its own" (p. 6).

Given the variety of qualitative research designs or strategies, I have chosen to organize this resource book around eight of the more commonly used approaches to doing qualitative research: basic interpretive, phenomenology, grounded theory, case study, ethnography, narrative analysis, critical, and postmodern-poststructural. These and other types of qualitative research do have some attributes in common that result in their falling under the umbrella concept of "qualitative." However, they each have a somewhat different focus, resulting in variations in how the research question might be asked, sample selection, data collection and analysis, and write-up. Following is a short description of each of the eight types. More thorough discussions of each type of qualitative research, along with examples and author commentaries, can be found in Part Two.

Basic Interpretive Qualitative Study. A basic interpretive and descriptive qualitative study exemplifies all the characteristics of qualitative research discussed above; that is, the researcher is interested in understanding how participants make meaning of a situation or phenomenon, this meaning is mediated through the researcher as instrument, the strategy is inductive, and the outcome is descriptive. In conducting a basic qualitative study, you seek to discover and understand a phenomenon, a process, the perspectives and worldviews of the people involved, or a combination of these. Data are collected through interviews, observations, or document analysis. These data are inductively analyzed to identify the recurring

patterns or common themes that cut across the data. A rich, descriptive account of the findings is presented and discussed, using references to the literature that framed the study in the first place. For example, Levinson and Levinson's (1996) study of women's development is situated in the literature on adult growth and development. The authors interviewed fifteen homemakers, fifteen corporate businesswomen, and fifteen academics. Findings of women's developmental patterns parallel their earlier study of male development in which forty men in midlife were interviewed. Levinson and Levinson found that the basic structure or underlying pattern of a woman's life evolves through periods of tumultuous, structure-building phases alternating with stable periods of development.

Phenomenology. Because phenomenology as a school of philosophical thought underpins all qualitative research, some assume that all qualitative research is phenomenological, and certainly in one sense it is. However, even though the phenomenological notions of experience and understanding run through all qualitative research, one could also engage in a phenomenological study using its own "tools" or inquiry techniques that differentiate it from other types of qualitative inquiry.

In the same way that ethnography focuses on culture, a phenomenological study focuses on the essence or structure of an experience. Phenomenologists are interested in showing how complex meanings are built out of simple units of direct experience. This form of inquiry is an attempt to deal with inner experiences unprobed in everyday life. According to Patton (1990), this type of research is based on "the assumption that *there is an essence or essences to shared experience*. . . . The experiences of different people are bracketed, analyzed, and compared to identify the essences of the phenomenon, for example, the essences of loneliness, the essence of being a mother, or the essence of being a participant in a particular program" (p. 70, emphasis in original).

In order to understand the essence or structure of an experience, the researcher temporarily has to put aside, or "bracket," personal attitudes or beliefs about the phenomenon. With belief temporarily suspended, consciousness itself becomes heightened, allowing the researcher to intuit or see the essence of the phenomenon. Examples of phenomenological studies include Howard's (1994) study of the experience of first-time computer users and Healy's (2001) recent study of insight meditation as a transformational learning experience.

Grounded Theory. It can be argued that Glaser and Strauss' 1967 book, *The Discovery of Grounded Theory,* launched, or at least was key in the development of qualitative research as a viable research paradigm. The goal of this type of qualitative study is to derive inductively from data a theory that is "grounded" in the data—hence, grounded theory. Grounded theory research emphasizes discovery with description and verification as secondary concerns. Researchers in this mode build substantive theory, which is distinguished from grand or formal theory. Substantive theory is localized, dealing with particular real-world situations such as how adults manage school, family, and work life, or what

constitutes an effective counseling program for teen mothers, or how a community allocates its resources.

Data gathered for a grounded theory study are analyzed via the constant comparative method of data analysis. Other qualitative researchers have adopted this method, which involves continually comparing one unit of data with another in order to derive conceptual elements of the theory, even though they may not be developing theory. This has resulted in some claiming they are doing a grounded theory study when in fact there is no substantive theory as an outcome of the inquiry. A grounded theory consists of categories, properties, and hypotheses that state relationships among categories and properties. Unlike hypotheses in experimental studies, grounded theory hypotheses are tentative and suggestive rather than tested.

Case Study. The case study is an intensive description and analysis of a phenomenon or social unit such as an individual, group, institution, or community. The case is a bounded, integrated system (Stake, 1995, Merriam, 1998). By concentrating upon a single phenomenon or entity (the case), this approach seeks to describe the phenomenon in depth. The unit of analysis, not the topic of investigation, characterizes a case study. For example, a study of women's experiences in welfare-to-work training programs could be a qualitative study but not a case study; the unit of analysis would be the women's experiences, and there could be an indefinite number of women selected for the study. For it to be a case study, one particular program (a bounded system), selected because it was typical, unique, experimental, or highly successful, etc., would be the unit of analysis. A case study could also be conducted of the experiences of a single woman.

Since it is the unit of analysis that determines whether a study is a case study, this type of qualitative research stands apart from the other types defined here. And in fact, since it is the unit of analysis that defines the case, other types of studies can be and sometimes are combined with case study. Ethnographic case studies are quite common, for example, wherein the culture of a particular social group is studied in depth. In addition, one could build grounded theory within a case study, or analyze the data from a case study from a critical science perspective, or obtain one person's "story," hence combining narrative with case study, and so on. The examples of case study in Part Two of this book illustrate how the case study is a vehicle for in-depth description and analysis.

Ethnographic Study. This form of qualitative research has a long tradition in the field of anthropology. It was developed by anthropologists specifically to study human society and culture. Although culture has been variously defined, it usually refers to the beliefs, values, and attitudes that shape the behavior of a particular group of people. D'Andrade (1992) writes that culture is something behaviorally and cognitively shared by an identifiable group of people and that it has "the potential of being passed on to new group members, to exist with some permanency through time and across space" (p. 230).

Confusion results when the term *ethnography* is used interchangeably with fieldwork, participant observation, case study, and so on. For a qualitative study to be an *ethnography,* it must present a sociocultural interpretation of the data. Therefore, ethnography is not defined by how data are collected, but rather by the lens through which the data are interpreted. As LeCompte and Preissle (1993) point out, "ethnographies re-create for the reader the shared beliefs, practices, artifacts, folk knowledge, and behaviors of some group of people" (pp. 2–3). Most people are familiar with ethnographies of foreign and exotic cultures such as Margaret Mead's *Coming of Age in Samoa* (1973). There are also many ethnographies of various social groups within a larger culture, such as Cordeiro and Carspecken's (1993) ethnographic account of twenty successful Hispanic high school achievers.

Narrative Analysis. The narrative analysis of lives, or life narratives, is currently a popular form of qualitative research. The key to this type of qualitative research is the use of stories as data, and more specifically, first-person accounts of experience told in story form. Other terms for this type of research include biography, autobiography, life history, oral history, autoethnography, and life narratives. Manning and Cullum-Swan (1994, p. 465) write that "narrative analysis typically takes the perspective of the teller, rather than that of the society." Context is important, however, for "if one defines narrative as a story with a beginning, middle, and end that reveals someone's experiences, narratives take many forms, are told in many settings, before many audiences, and with various degrees of connection to actual events or persons" (p. 465).

There are several strategies one can use to do the actual analysis of narratives or people's stories. The three most common are psychological, biographical, and discourse analysis. In the psychological approach, the story is analyzed in terms of internal thoughts and motivations. A more biographical approach attends to the person in relation to society and takes into account the influences of gender, class, and "family beginnings" (Denzin, 1989, p. 17). Discourse analysis examines the written text of the story for its component parts or assesses the spoken words by looking for intonation, pitch, and pauses as lens to the meaning of the text (Gee, 1991). Whatever the approach to analyzing the data, the central defining feature of this type of qualitative research is that the data are in the form of a story. Part Two contains two examples of narrative analysis.

Critical Qualitative Research. Drawing from critical social science and in particular Habermas' (1972) theory of knowledge, critical qualitative research uncovers, examines, and critiques the social, cultural, and psychological assumptions that structure and limit our ways of thinking and being in the world. The ultimate objective of this type of critique is to free ourselves from these constraints, to become empowered to change our social context and ourselves.

Critical research focuses less on individuals than on context. Critical educational research, for example, queries the context where learning takes place, including

the larger systems of society, the culture and institutions that shape educational practice, the structural and historical conditions framing practice. Questions are asked regarding whose interests are being served by the way the educational system is organized, who really has access to particular programs, who has the power to make changes, and what are the outcomes of the way in which education is structured. Critical qualitative research, then, raises questions about the influence of race, class, and gender (and their intersections), how power relations advance the interests of one group while oppressing those of other groups, and the nature of truth and the construction of knowledge.

A critical perspective informs other types of research, most commonly participatory action research (PAR) and some feminist research. PAR focuses upon the political empowerment of people through group participation in the search for and acquisition of knowledge and subsequent action to change the status quo. Critical feminist research questions and critiques the societal, historical, and cultural assumptions about women that have resulted in their marginal status compared to men.

Postmodern Research. The most recent development in qualitative research is the infusion of a postmodern or poststructural perspective. In contrast to the "modern" world, where reality is predictable, research is scientific, and there are assumed to be universal norms for truth and morality, the postmodern world is one of uncertainty, fragmentation, diversity, and plurality. There are many truths, and all generalizations, hierarchies, typologies, and binaries (good/bad, right/wrong, male/female, etc.) are "contested," "troubled," or challenged.

Postmodern research thus challenges the form and categories of traditional qualitative research. A postmodern research report does not follow a specific format; each has its own rhythm and structure. Data analysis also differs from traditional qualitative research. This has created what Denzin and Lincoln (2000) call a "triple crisis." The first crisis has to do with representation—postmodern researchers question whether the lived experience of someone else can be captured; "such experience, it is now argued, is created in the social text written by the researcher" (p. 17). The second crisis has to do with being able to evaluate postmodern research. What makes a study valid and reliable if traditional qualitative criteria are inadequate? Because postmodern research is so experimental and each study unique, there are few if any guidelines about how to do this type of study, or how to assess its trustworthiness. The third crisis has to do with social action. "If society is only and always a text" (p. 17), how can participatory action research, for example, bring about change?

To summarize this brief overview of the different designs or types of qualitative research, we see that the eight chosen for review vary widely in form and purpose. Not all qualitative research is the same; neither can terms such as "grounded theory," "ethnography," "narrative analysis," and so on be used interchangeably.

However, because of the underlying view of reality and the focus on understanding and meaning, the forms of qualitative research reviewed here have some characteristics in common that allow them to be categorized as "qualitative." A more detailed discussion of these types can be found in Part Two, along with examples and author commentaries.

The Design of a Qualitative Study

The design of a qualitative study focused on interpretation includes shaping a problem for this type of study, selecting a sample, collecting and analyzing data, and writing up the findings. An understanding of this process is important for assessing the rigor and value of individual reports of research (see Chapter Two for more discussion on evaluating and assessing qualitative research). Presented here is a brief overview of the component parts of the process of conducting a qualitative research study.

The Research Problem and Sample Selection. A research study begins with your being curious about something, and that "something" is usually related to your work, your family, your community, or yourself. A research problem can also come from social and political issues of the day or from the literature. Often these spheres intersect. For example, perhaps you work for a social service agency that assists the homeless in becoming stabilized in their housing needs. Your work is very much about a pressing social problem. Or you might have observed how comfortable your children are with computers and you wonder how people *your* age are learning to function in this technological age. In any case, the place to "look" for a research problem is in your everyday experience—ask questions about it, be curious as to why things are as they are or how they might be better.

The types of questions that you ask are key to doing a qualitative study. Marshall and Rossman (1995) suggest that qualitative research is designed to (1) understand processes, (2) describe poorly understood phenomena, (3) understand differences between stated and implemented policies or theories, and (4) discover thus far unspecified contextual variables. If you want to understand a phenomenon, uncover the meaning a situation has for those involved, or delineate process (how things happen), then a qualitative design would be most appropriate. For example, with regard to the first topic above, you might ask what the experience of being homeless is *really* like, or you might ask what the necessary steps or stages are in the transition process of moving from homelessness to stable housing. Or from a more critical perspective, you could ask how the social service agency for which you work reinforces, challenges, or mediates the problem of homelessness. Does it further oppress the homeless with its rules and regulations, or does it empower individuals to act on their behalf?

The basic question of your study is set within what is called the problem statement. In crafting the research problem, you move from general interest, curiosity, or doubt about a situation to a specific statement of the research problem. In effect, you have to translate your general curiosity into a problem that can be addressed through research. The structure of a problem statement moves from the

general topic of interest, including key concepts, what has already been studied, why it's an important topic, to the specific question that you have. This specific question is most often written as a purpose statement and addresses some gap in the knowledge base on that topic (if previous research has already provided an answer to your question, there is no need to do the study). Using the homeless topic above, one purpose statement might read: "The purpose of this study is to understand the experience of being homeless," or "The purpose of this study is to identify the process of moving from homelessness to stable housing," or, "The purpose of this study is to uncover how a social service agency both reinforces and challenges the state of homelessness of its clients." (For more on problem formation, see Merriam, 1998; Merriam & Simpson, 2000).

The next step in the design of a qualitative study is to select a sample from which you will collect data. For nearly every study there exist sites that could be visited, people who could be interviewed, documents that could be read and analyzed. How do you select *which* sites, people, and documents to be included in your study? To begin with, since you are not interested in "how much" or "how often," random sampling makes little sense. Instead, since qualitative inquiry seeks to understand the meaning of a phenomenon from the perspectives of the participants, it is important to select a sample from which the most can be learned. This is called a purposive or purposeful sample. Patton (1990) argues that it is important to select "*information-rich cases* for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the research, thus the term *purposeful* sampling" (p. 169, emphasis in original). To begin purposive sampling, you first determine what criteria are essential in choosing who is to be interviewed or what sites are to be observed. In the study of the experience of homelessness, for example, you would first decide whether men and women would be included, what age range would be important, the length of homelessness, and so on.

Data Collection and Analysis. There are three major sources of data for a qualitative research study—interviews, observations, and documents. The data collection strategy used is determined by the question of the study and by determining which source(s) of data will yield the best information with which to answer the question. Often there is a primary method of collecting data with support from another. Sometimes only one method is used. For example, in studying how a social service agency both reinforces and challenges the status quo of the homeless, you might interview both homeless people and staff of the agency, conduct observations of the daily operation of the agency, and study internal and external agency documents. However, if you were most interested in the experience of homelessness, interviews with those who are or have been homeless would yield the most relevant information. If at all possible, researchers are encouraged to use more than one method of data collection as multiple methods enhance the validity of the findings.

Interviews range from highly structured, where specific questions and the order in which they are asked are determined ahead of time, to unstructured,

where one has topic areas to explore but neither the questions nor the order are predetermined. Most interviews fall somewhere in between. The semistructured interview contains a mix of more and less structured questions. Usually, specific information is desired from all the participants; this forms the highly structured section of the interview. The largest part of the interview is guided by a list of questions or issues to be explored, and neither the exact wording nor the order of the questions is determined ahead of time.

A second major means of collecting data is through observation. Observational data represent a firsthand encounter with the phenomenon of interest rather than a secondhand account obtained in an interview. Like interviewing, there is a range here also from being a complete observer to being an active participant. A complete observer is unknown to those being observed, such as from behind a one-way mirror or in an open, public place. A very active participant observer might be someone who is a member of the group or organization who is thus participating while observing. When observation is used in conjunction with interviewing, the term *fieldwork* or *field study* is sometimes used. Observation is the best technique when an activity, event, or situation can be observed firsthand, when a fresh perspective is desired, or when participants are not able or willing to discuss the phenomenon under study.

The third major source of data is documents. These can be written, oral, visual (such as photographs), or cultural artifacts. Public records, personal documents, and physical material are types of documents available to the researcher for analysis. The strength of documents as a data source lies with the fact that they already exist in the situation; they do not intrude upon or alter the setting in ways that the presence of the investigator might. Nor are they dependent upon the whims of human beings whose cooperation is essential for collecting data through interviews and observations. Entire studies can be built around documents. For example, Abramson's (1992) case study of Russian Jewish emigration is based solely on his grandfather's diaries written over a twelve-year period. In contrast to documents already present in the research setting, researcher-generated documents are prepared at the request of the researcher after the study has begun. Participants might be asked to keep a diary or a log of their activities relevant to the phenomenon being studied, take pictures, write a life history, and so on. Whether preexisting or researcher-generated, documents often contain insights and clues into the phenomenon, and most researchers find them well worth the effort to locate and examine.

Interviews, observations, and documents are the three traditional sources of data in a qualitative research study. With the advent of computer technology and the World Wide Web, data can also be collected on-line. Web pages, papers available on-line, and so on can be considered documents simply accessed on-line; artifacts in the form of illustrations and games can be downloaded; interviews can be conducted by e-mail; and researchers can "observe" on-line chat rooms and other forms of interaction. On-line data collection to some extent offers an electronic extension of familiar data-gathering techniques. However, the medium affects the nature of the data collected (an on-line interview will be different from

an in-person interview). As with any form of data collection, researchers need to be cognizant of the characteristics of each strategy and how those characteristics shape the nature of the data collected.

In qualitative research, data analysis is *simultaneous* with data collection. That is, one begins analyzing data with the first interview, the first observation, the first document accessed in the study. Simultaneous data collection and analysis allows the researcher to make adjustments along the way, even to the point of redirecting data collection, and to "test" emerging concepts, themes, and categories against subsequent data. To wait until all data are collected is to lose the opportunity to gather more reliable and valid data; to wait until the end is also to court disaster, as many a qualitative researcher has found himself or herself facing hundreds of pages of transcripts or field notes without a clue where to begin.

With that caveat in mind, data analysis is essentially an inductive strategy. One begins with a unit of data (any meaningful word, phrase, narrative, etc.) and compares it to another unit of data, and so on, all the while looking for common patterns across the data. These patterns are given names (codes) and are refined and adjusted as the analysis proceeds.

Although all qualitative data analysis is inductive, different theoretical stances and different disciplines have evolved particular strategies for data analysis. In an ethnographic study, for example, an organizing scheme or typology of categories might be used such as Lofland and Lofland's (1995) four broad categories for organizing aspects of society (economy, demographics, social structures, the environment). Narrative analysis might employ psychological, literary, or sociolinguistic data analysis strategies. Many qualitative researchers have adopted the constant comparative method, originally used for developing grounded theory, whether or not they are seeking to build substantive theory. In a phenomenological study, specific techniques such as epoche, bracketing, imaginative variation, and so on are used to analyze experience. In a postmodern-poststructural study, new forms of data analysis are being developed such as deconstruction, rhizoanalysis, genealogy, archaeology, and schizoanalyses (Elizabeth St. Pierre, personal communication, February 2001). These and other data analysis strategies are addressed in a bit more detail under the appropriate sections of Part Two. However, for more detailed discussions, readers are encouraged to refer to some of the resources listed here and in Part Two.

Writing Up Qualitative Research. There is no standard format for reporting qualitative research. Rather, as can be seen from a quick glance at the sixteen reports of qualitative research in Part Two of this book, there is a diversity of styles, some of which are quite creative. Although not addressed in this book, the presentation of qualitative findings can be through media other than print (for example, drama, dance, film).

In any write-up of qualitative research, what does need to be considered is the audience for the report. A funding agency or the general public may want an executive summary of the findings and will probably not be interested in

how the study was conducted. But colleagues and other researchers will want a detailed description of the methodology in order to assess the study's contribution to the field.

Although the relative emphasis given each section as well as the overall form of the report can vary widely, *all* write-ups of qualitative research contain at the very minimum a discussion of the research problem, the way the investigation was conducted, and the findings, including a discussion of their importance or relevance to theory and practice. Since findings are in the form of words rather than numbers, reports vary widely with regard to the ratio of supporting "raw" data included versus interpretation and analysis. The best guideline is whether enough data in the form of quotes from interviews, episodes from field observations, or documentary evidence are presented to support adequately and convincingly the study's findings. In qualitative research, it is the rich, thick descriptions, the words (not numbers) that persuade the reader of the trustworthiness of the findings. Nevertheless, in any report, there is tension between having the right amount of supporting data versus analysis and interpretation. Another problem is finding the right voice to present the findings. Write-ups can vary from intimate, first-person accounts to more formal presentations to creative experimentation wherein the text is divided by perspective. For example, Lather and Smithies (1997) use a split-text format wherein the participants' words are presented on the same page parallel to the researchers' interpretation. In another example, Wolf (1992) presents the same tale of a woman shaman in Taiwan as a short story, as field notes, and as an academic journal article.

Summary

This chapter has presented an introductory overview of qualitative research. *Qualitative research* is an umbrella term that encompasses several philosophical or theoretical orientations, the most common being interpretive, critical, and postmodern. There are also several designs, types, or genres of qualitative research, including a basic interpretive study, phenomenology, grounded theory, case study, narrative analysis, ethnography, critical qualitative research, and postmodern or poststructural research. All these types of qualitative research have in common the search for meaning and understanding, the researcher as the primary instrument of data collection and analysis, an inductive analysis process, and a product that is a rich description of the phenomenon.

Also reviewed in this chapter are the phases of a qualitative research process. One must first shape a research problem that is appropriate for qualitative inquiry. Next, a purposeful sample is chosen from which data are collected. The three primary sources of data are interviews, observations, and documents. As data are being collected, data analysis is ongoing and simultaneous. There are a variety of data analysis strategies that can be employed, depending upon the type of qualitative study. Finally, it is important to present the findings of the study

in a format appropriate to the audience. It is only through the presentation and dissemination of the study's findings that a contribution can be made to the knowledge base of a field and to practice.

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Using a qualitative approach to evaluation research does not mean taking a quantitative data analysis and conducting a couple of interviews to support findings. It does not mean quantifying qualitative data either. Rather, using such an approach means finding systematic ways to identify qualitative indicators that measure project performanceâ€"utilizing many of the qualitative data acquisition and collection tools that I discuss in this series on Qualitative Methods in Monitoring and Evaluation. This series in Qualitative Methods in Monitoring and Evaluation grew out of my practical experiences