

Doing Qualitative Research: *Why, What, and How?*

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Why (and Why Not)?

Why do qualitative work?

- Because the methodology fits your RQ
 - “Get at the inner experience of participants”
 - “Determine how meanings are formed”
 - “Discover rather than test variables”
- Because the methodology appeals to you
 - You’re “drawn to fluid, evolving, dynamic” research
 - You “enjoy serendipity and discovery”
 - You enjoy learning about & connecting with people
 - You enjoy “playing with words, making order of out seeming disorder, and thinking in terms of complex relationships” – and you can live with ambiguity

(Corbin & Strauss 2008, *Basics of Qualitative Research 3e*, p. 12)

Why (and Why Not)?

- Qualitative methods are *best* for:
 - Exploring new, poorly understood topics or phenomena
 - Observing social processes in detail, understanding mechanisms behind relationships
 - Understanding how people make sense of the world
 - Rich description, detailed cases, complex relationships
 - Generating theory
- Qualitative methods are *less good* for:
 - Measuring “how much” or “how often”
 - Testing a hypothesis

One topic, two approaches

Qualitative RQs

- What symbols and narratives were used to convince members of the diaspora to contribute to the response to Ebola?
- Were conversations about Ebola framed in terms of morality, obligation, or guilt? If so, how did those frames resonate (or not) with individuals in the diaspora?
- How did individuals make sense of their choice (i.e., whether and how to contribute)?

Quantitative RQs

- How many members of the West African diaspora contributed time, money, or expertise to the response to the Ebola outbreak?
- Were certain groups more or less likely to contribute?
- Did membership in diaspora organizations or exposure to certain kinds of messages increase the likelihood of contributing?

Qual vs. Quant

Table 1.1. Characteristics of Qualitative and Quantitative Research.

<i>Point of Comparison</i>	<i>Qualitative Research</i>	<i>Quantitative Research</i>
Focus of research	Quality (nature, essence)	Quantity (how much, how many)
Philosophical roots	Phenomenology, symbolic interactionism	Positivism, logical empiricism
Associated phrases	Fieldwork, ethnographic, naturalistic, grounded, constructivist	Experimental, empirical, statistical
Goal of investigation	Understanding, description, discovery, meaning, hypothesis generating	Prediction, control, description, confirmation, hypothesis testing
Design characteristics	Flexible, evolving, emergent	Predetermined, structured
Sample	Small, nonrandom, purposeful, theoretical	Large, random, representative
Data collection	Researcher as primary instrument, interviews, observations, documents	Inanimate instruments (scales, tests, surveys, questionnaires, computers)
Mode of analysis	Inductive (by researcher)	Deductive (by statistical methods)
Findings	Comprehensive, holistic, expansive, richly descriptive	Precise, numerical

Merriam, Sharan B. 1998. *Qualitative Research and Case Study Applications in Education*. San Francisco: Jossey-Bass, p. 9

Thoughts? Reflections?

- Any questions or concerns about the use of qualitative methods for your topic?
- What led you to consider using qualitative methods?

What?

What?

- What do we mean by qualitative research?

Data: Words [or images] (vs. numbers)

Reasoning: Primarily inductive (vs. deductive)

Analysis: Exploratory (vs. confirmatory)

Study design: Flexible, iterative (vs. structured)

What?

- Common types of qualitative data

Written [or visual] texts

Observations, ethnographic field notes

Interviews

Texts (and images and artifacts)

- Any written text: social media, non-social media, organizational records, personal journals, ...
 - Also visual “texts”(images, videos) or material objects or “artifacts”
- These data already exist (so you don’t usually need IRB)
 - You have to decide how to gather, code, and analyze
 - Lots of specific methods: e.g., content & discourse analysis
- Can incorporate quantitative methods (e.g. numeric comparisons across a larger number of texts) as well as qualitative (deep engagement with fewer texts)

Observation / ethnographic

- “Deep hanging out” (Clifford Geertz)
- Public spaces, organizational settings, etc.
- Could be participant or nonparticipant
- Jot down quick notes “in the field,” and write longer field notes & memos later that day
- Do (usually) need to include in your IRB

Interviews

- Various types and styles of interviews
 - Survey-style
 - Structured
 - Semi-structured
 - Open-ended
- We'll talk more about the “how” of interviews later...

Interviews

- Interviews are GOOD for understanding:
 - Your respondent's subjective experiences
 - What your respondent *thinks*
 - What your respondent *thinks* about what other people *do*
- Interviews are OK for understanding:
 - What your respondent *does*
- Interviews are NOT good for:
 - Documenting large-scale trends
 - Understanding *other* people's subjective experiences
 - Understanding what *other* people *do* or *think*

Adapted from Eva Rosen, "Guide to Interview Guides and Interviewing"

Tips on combining methods

- Observations before and during an interview
 - Features of the situation where the interview takes place (if relevant to your question)
 - What your respondent does (not just what she says)
 - Unexpected events
 - Your own experience: how you feel, what you do while you're waiting, what surprises you
 - At a minimum, these can add color & richness to your interview data

Tips on combining methods

- Texts to accompany interviews
 - Collect texts or objects first and ask respondents to react to them
 - E.g., What does this mean to you?
 - Ask respondents if they have texts they would be willing to share. Or ask them to create texts!
 - E.g., Did your organization keep any records about X? Did you post anything on Facebook during that time that you would be willing to share with me?
 - E.g., Could you draw a map of your neighborhood for me?

Now your turn!

- Imagine you needed to collect a combination of textual, observational, and interview data for your research question
- Brainstorm - what kinds of data might you use in each category?

How?

A few important, overarching
considerations

How?

- Practical considerations
 - IRB
 - Timing! Make a calendar and leave lots of cushion
 - Data collection (including recruitment / access), transcription, coding, developing an argument, writing it all up...
 - Feasibility and sample size
 - Organization and record-keeping
 - Keep detailed notes of what you did, when, and why

How?

- Methodological considerations
 - Sampling
 - Memos
 - Flexibility and iteration
 - Writing

Sampling

- Probability sampling (i.e., random)
 - Less relevant for qualitative research; the goal is NOT to draw statistical generalizations
- Purposive / purposeful / criterion-based
 - Select a sample from which you can learn as much as possible
 - “Information-rich cases” in terms of the core issues related to your research
 - List attributes and find cases / individuals / units that match your list

Merriam, Sharan B. 1998. *Qualitative Research and Case Study Applications in Education*. San Francisco: Jossey-Bass, p. 9

Types of purposive sampling

- **Typical:** Average person, situation, or instance
- **Unique:** Atypical, perhaps rare attributes or occurrences
- **Maximum variation:** Intentional diversity in the sample; may seek negative or disconfirming instances
- **Snowball (or Chain or Network):** Ask participants to refer you to others who match the attributes you're looking for
- **Theoretical:** Sampling occurs alongside analysis, guided by an emerging theory
- **Convenience:** Of course this plays a role, but do NOT choose your sample only on this basis

Memos

- A key part of coding, but I'd recommend you start much sooner -- ideally daily from Day 1!
- Initial memos may:
 - Be short, free-form, casual
 - Document your research process
 - E.g., What did you read that day? Who did you interview that day? How did it go?
 - Highlight what's interesting, puzzling, surprising
 - Raise questions, things you're struggling with
 - Suggest future steps
 - E.g., "Look into the history of X." "Try to identify cases that include Y" "Find a participant who has Z characteristic."

Memos, cont.

- Later analytic memos will:
 - Be more structured, detailed, formal
 - Start to connect the dots – bring together codes, themes, research questions
 - *Still* highlight what's interesting, puzzling, surprising
 - Allow you to try out parts of your argument, begin to assemble evidence
- Memos can also be used for:
 - Describing in detail an experience you had in the field, or an interview that especially affected you in some way
 - Providing space for *your* reflections, *your* perspectives, *your* voice

Memos, cont.

- What do you do with your memos?
 - Share (some) with your advisors, a great way to get feedback before you have a full chapter
 - Read back through them (and code them) as you assemble your arguments.
 - Often your main thesis will appear in an early memo, though you didn't know it at the time!
 - Use them to help write your chapters. You might be able to take whole paragraphs from memos.

Flexibility and iteration

- Remember these?
 - “Fluid, evolving, dynamic” research... “Live with ambiguity”
- The question you think you’re asking may not be the question you end up answering
 - Be open to unexpected discoveries, changing direction
 - But also be sure to finish!
- Listen back/ start transcribing & writing memos while you’re still interviewing
 - Don’t wait to analyze until after all your data is collected
 - Use these to modify, narrow, improve your approach
 - Also use for theoretical sampling

Writing qualitative sociology

- This is part of the “art” of qualitative research, and part of what will make your thesis convincing (or not)
- Find an example (a prize-winning thesis, a sociology book or article that you love) and follow their structure, use some of their techniques for presenting data
- Lots of resources for this – ask me!

Tips for convincing your reader

- Explain methods and procedures of data collection and coding
- Link conclusions explicitly with exhibits of data (quotes or conceptual displays)
- Be explicit about potential biases/limitations
- Address competing explanations
- Explicitly connect to theory

(From Ann Owens, "Qualitative Analysis Basics,"
adapted from Miles and Huberman 1994)

How?

The nitty gritty

How?

- Interviews
- Observations
- Texts

(See supplementary handouts)

Next steps

Qualitative Advisor Role

- For now, available by appointment
 - rmanning@hbs.edu
- How / when I can help
 - Study design
 - Reviewing an interview guide
 - Developing a code book
 - Writing about qualitative methodologies
 - Other things?? Let me know if you're stuck!

BUT: You have to meet with me to get feedback!

Final thoughts...

“The world is very complex. There are no simple explanations... Rather, events are the result of multiple factors coming together and interacting in complex and often unanticipated ways. Therefore any methodology that attempts to understand experience and explain situations will have to be complex. We believe it is important to capture as much of this complexity in our research as possible, at the same time knowing that capturing it all is virtually impossible. We try to obtain multiple perspectives on events and build variation into our analytic schemes... We don’t necessarily want to reduce understanding of action/interaction/emotion to one explanation or theoretical scheme; however, we do believe that concepts of various levels of abstraction form the basis of analysis. Concepts provide ways of talking about and arriving at shared understandings among professionals.”

(Corbin & Strauss. 2008. *Basics of Qualitative Research 3e*, p. 8)