

CHAPTER 1

Developing contextual research that matters

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In summary

What is the first thing that comes to mind when you hear the words, “research methods?”

Many people never think explicitly about this question, and if they do, they think that research methods are difficult to learn and painstaking to conduct. However, you might be surprised to discover that you engage in research every day – and these methods not only provide important resources for understanding the world, but are actually a common and enjoyable way to spend our time.

We ask questions, listen to stories, watch others, participate in meetings, check our text messages, gossip, and engage in dialogue. In doing so, we gather qualitative data about social phenomena. Through talking to others we learn about their quirks, interests, pet peeves, and sense of humor. We learn about their culture. We think about these experiences, make patterns of meanings, and absorb the scene.

Simultaneously, share our own understandings in conversations, blog entries, and emails. In telling these stories we call out the most important players and evaluate their behavior. We do this to pass the time, interact, and have fun. But we also do it to understand the world and our place within it. We make sense through our talk, and our meaning making helps us know what to expect at future events. So, at a basic level, we all engage in research everyday. The focused study of research methods takes these everyday actions one step further: to a systematic anal-

ysis that may lead to better understandings – not only for us, but for others.

Overview and introduction

This book guides readers step by step through the qualitative methods process – research design, data collection, analysis, and creating a representation that can be shared with others, be that a class paper, a publication, a performance, a service portfolio, a website entry, or a letter to the editor. I will impart aspects of qualitative research I have found most methodologically sound, helpful, beautiful, fun, and interesting. I will also pause to discuss concepts that I have not practiced myself, but that are common in the field. This book offers guidance no matter whether you are a graduate student learning the basics of qualitative methods, an undergraduate completing a service project, a critical performance artist wishing to interrogate power relations, a rhetorician interested in complementing textual analysis, or a quantitative researcher hoping to augment statistical findings through qualitative insights.

Chapter 1 opens by introducing three central concepts that can jumpstart a qualitative project: self-reflexivity, context, and thick description. Next, I overview the unique, praxis-based, contextual approach of the book and how qualitative research is well poised for researching a number of disciplinary areas. Finally, I discuss the first steps in conducting a research project, including choosing a context and developing research questions.

Three core qualitative concepts: self-reflexivity, context, and thick description

Self-reflexivity

Self-reflexivity refers to the careful consideration of the ways in which researchers’ past experiences, points of view, and roles impact these same researchers’ interactions with, and interpretations of, the research scene. Let’s examine this definition in more detail.

Every researcher has a point a view, an opinion, or a way of seeing the world. Some people call this “baggage”; others call it wisdom. Rather than deny our way of seeing and

being in the world, qualitative researchers acknowledge, and even celebrate it. A person's demographic information provides the basic ingredients of a researcher's perspective. For example, I am female, white, heterosexual, forty-something, partnered, and an aunt. My work roles have included professor, public relations coordinator, and cruise ship activities director. I raced an "Ironman" triathlon, and I drive a Mini Cooper Clubman. I believe that success rewards virtuous action and that good research provides opportunities for transformation.

This background shapes my approach toward various topics and research in general. Likewise, your own background, values, and beliefs fundamentally shape the way you approach and conduct research. The mind and body of a qualitative researcher literally serve as research instruments – absorbing, sifting through, and interpreting the world through observation, participation, and interviewing. These are the analytical resources of our own "subjectivity." Of course, our bodies and minds also live in a context.

Context

Qualitative research is about immersing oneself in a scene and trying to make sense of it – whether at a company meeting, in a community festival, or during an interview. Qualitative researchers purposefully examine and make note of small cues in order to decide how to behave, as well as to make sense of the context and build larger knowledge claims about the culture.

Clifford Geertz, sometimes referred to as the father of interpretive anthropology, focused specifically on context, preferring to examine the field's rich specificity. As Geertz (1973) famously put it: "Man is an animal suspended in webs of significance he himself has spun, I take culture to be those webs, and the analysis of it to be therefore not an experimental science in search of law but an interpretive one in search of meaning" (p. 5). Ethnographers construct meaning through immersion in a context comparable to that of scientific research – say, an experimental laboratory study – that isolates variables and controls circumstances, so that findings can be replicated.

Indeed qualitative researchers believe that the empirical and theoretical resources needed to comprehend a particular idea, or to predict its future trajectory, are themselves interwoven with, and throughout, the context. Social theories are based in the ever-changing, biased, and contextualized social conditions of their production. So, for example, we can read detailed analyses of inner-city poverty and glean emergent theories of social justice from these rich evocations.

Thick description

Directly related to context is the idea of **thick description**, according to which researchers immerse themselves in a culture, investigate the particular circumstances present in that scene, and only then move toward grander statements and theories. Meaning cannot be divorced from this thick contextual description. For instance, without a context, a person's winking could mean any number of things, including that the person is flirting, is trying to communicate secretly, has an uncontrollable facial twitch, or is imitating someone else's twitch (Geertz, 1973). The meaning of the wink comes precisely from the complex specificity and the circumstances that inform interpretations of intention; "The aim is to draw large conclusions from small, but very densely textured

facts; to support broad assertions about the role of culture in the construction of collective life by engaging them exactly with complex specifics” (p. 28).

By describing the background and context of action, researchers can decipher a twitch and tell it apart from a wink and from a parody of a wink – and they may interpret the meaning(s) of all these gestures and help predict whether we are likely to see the behavior again. This process of interpretation is dependent upon the scene’s particulars. This being the case, context provides a central role for qualitative research, while *a priori* theory takes a back seat. Given the focus on context, the driving force of much qualitative research is practical in nature.

A phronetic approach: doing qualitative research that matters

I take a praxis-based or “phronetic” approach to research (Tracy, 2007). This approach suggests that qualitative data can be systematically gathered, organized, interpreted, analyzed, and communicated so as to address real world concerns. I suggest that researchers begin their research process by identifying a particular issue, problem, or dilemma in the world and then proceed to systematically interpret the data in order to provide an analysis that sheds light on the issue and/or opens a path for possible social transformation. Doing “use-inspired” (Stokes, 1997) contextual research is especially well suited for service learning, socially embedded research, public intellectualism, funded projects, and community partnerships.

What is **phronetic research**? The ancient Greek noun *phronēsis* is generally translated as ‘prudence’ or ‘practical wisdom’ (Aristotle, 2004). *Phronēsis* is concerned with contextual knowledge that is interactively constructed, action oriented and imbued with certain values (Cairns & Śliwa, 2008). Research conducted under its guidance serves “to clarify and deliberate about the problems and risks we face and to outline how things may be done differently, in full knowledge that we cannot find ultimate answers to these questions or even a single version of what the questions are” (Flyvbjerg, 2001, p. 140). This approach assumes that perception comes from a specific (self-reflexive) subject position and that the social and historical roots of an issue precede individual motivations and actions. It also assumes that communication produces identity for the researchers as well as for those researched, and that it generates knowledge that benefits some more than others. Qualitative methods are especially suited for examining phronetic questions about morality and values. Social action is always changing; therefore contextual explanations and situated meanings are integral to ongoing sensemaking.

Strengths of qualitative research

Through a phronetic approach that focuses on self-reflexivity, context, and thick description, qualitative research has a number of advantages as a research method. First, many researchers – especially young scholars who do not have the luxury of comfy offices or high-tech laboratories – are all too happy to escape their shared apartments and cramped graduate school offices and venture into the field. This may be why so many excellent ethnographies are conducted by people under the age of 30. As Goffman (1989) said about naturalistic field research: “You’re going to be an ass... And that’s one reason why you have to be young to do fieldwork. It’s harder to be an ass when you are old” (p. 128).

Second, qualitative research is excellent for studying contexts you are personally curious about but have never before had a “valid” reason for entering. Third, in addition to personal interest or disciplined voyeurism, qualitative data provide insight into cultural activities that might otherwise be missed in structured surveys or experiments.

Fourth, qualitative research can uncover salient issues that can later be studied using more structured methods. Indeed field research may lead to close and trusting relationships that encourage a level of disclosure unparalleled in self-reports or snapshot examinations of a scene. Such work has the potential to provide insight about marginalized, stereotyped, or unknown populations – a peek into regularly guarded worlds, and an opportunity to tell a story that few know about. Such was the case with Lindemann’s (2007) work with homeless street vendors who sell newspapers in San Francisco to survive.

Fifth, qualitative research is especially well suited for accessing tacit, taken-for-granted, intuitive understandings of a culture. Rather than merely *asking about* what people *say* they do, researching in context provides an opportunity to see and hear what people *actually* do. Rather than relying on participants’ espoused values, we come to understand participants’ values-in-use (Schein, 2004) and how they live out these values on a daily basis. The more researchers become immersed in the scene, the more they can make **second-order interpretations** – meaning that researchers construct explanations for the participants’ explanations.

Sixth, and perhaps most importantly, good qualitative research helps people to understand the world, their society, and its institutions. Qualitative methodology can provide knowledge that targets societal issues, questions, or problems and therefore serves humankind. In summary, qualitative research:

- is rich and holistic;
- offers more than a snapshot – provides understanding of a sustained process;
- focuses on lived experience, placed in its context;
- honors participants’ local meanings;
- can help explain, illuminate, or reinterpret quantitative data;
- interprets participant viewpoints and stories;
- preserves the chronological flow, documenting what events lead to what consequences, and explaining *why* this chronology may have occurred;
- celebrates how research representations (reports, articles, performances) constitute reality and affect the questions we can ask and what we can know;
- illustrates how a multitude of interpretations are possible, but how some are more theoretically compelling, morally significant, or practically important than others.

In short, qualitative methods are appropriate and helpful for achieving a variety of research goals – either on their own or in a complementary relationship with other research methods.

Foci of qualitative research

Qualitative research can be found in a range of disciplines and topic areas. The annual Congress for Qualitative Inquiry held at the University of Illinois regularly boasts representation from over 40 disciplines and 55 nations. This involvement serves as a testament to the global reach and cross-disciplinary popularity of qualitative methods.

Understanding the self

Critical self-examination offers one important context for qualitative research. **Autoethnography** is an autobiographical genre of writing that connects the analysis of one's own identity, culture, feelings, and values to larger societal issues. Jago (2002), for instance, undertakes a powerful examination of mental illness and academic life in critically examining her own "academic depression." Goodall (2006) takes readers along on his own journey of understanding the secrets of his family life and of his father's cloaked career in the Central Intelligence Agency. Ellis (2008) chronicles personal life loss and trauma by constructing "narrative snapshots" and compiling them together, in a manner akin to that of a video or text in motion.

Qualitative researchers frequently consider their own personal stories or experiences as spaces for further exploration, examination, and representation. A particular joy, tragedy, or experience is especially fruitful for study if it is rare or understudied, if it connects up with larger social narratives, or if current research on the topic is lacking in personal standpoint. Focusing on the micro-events of one's own life can also provide important lessons about larger societal structures and problems. Through a vivid focus on power and justice, autoethnography can improve social conditions and unpack the personal implications of difficult issues – such as abortion (Minge, 2006) or eating disorders (Tillmann-Healy, 1996).

Understanding relationships

Qualitative research can also provide important insight into interpersonal relationships. Through interviews and participant observation, researchers examine romantic partnerships, friendships, customer-service encounters, superior-subordinate and doctor-patient relationships (Real, Bramson, & Poole, 2009), learning why people engage in such relationships, the way their interactions emerge and change, and how they evidence their feelings for each other. For example, Vande Berg and Trujillo (2008) bravely told their final love story in *Cancer and death: A love story in two voices*. Erbert and Alemán (2008) interviewed grandparents about the tensions of surrogate parenting. Qualitative studies can also illuminate the "dark side" of relationships, including conflict, emotional abuse, and deviance (Olson, Daggs, Ellevold, & Rogers, 2007).

Much qualitative research is itself relational, in that data are gathered by using one-to-one interactions between researcher and participants. For example, Ellis (2010) interviewed holocaust survivors and their children and in doing so explored what happens when the interviewer and the interviewee jointly construct the meaning of an historical event. Such methods provide an opportunity for learning "what it feels like" to be in one of these relationships.

Understanding groups and organizations

Families, work groups, sports teams, clubs, support circles, or volunteers are often the topics of qualitative research. For example, Adelman and Frey (1997) volunteered at the Bonaventure House facility for people living with AIDS and studied how communication practices mediate the tension between individual clients' needs and the groups' need for a community. Other qualitative research on groups covers topics such as the shared ideology espoused in Alcoholics Anonymous meetings (Right, 1997), the communication dialectics

in a community theater troupe (Kramer, 2004) and coping processes in post-divorce families (Afifi, Hutchinson, & Krouse, 2006).

Organizational studies are replete with qualitative accounts of a wide variety of topics: gender, power, leadership, followership, socialization – and more. These come in the form of the famous Harvard Business School Case Studies – detailed narratives of business situations describing typical management dilemmas and no obvious right answers – as well as in a myriad of other examinations of organizational culture (Tracy & Geist-Martin, in press).

Some qualitative researchers become full participants in the organization – as employees, interns, or volunteers (Murphy, 1998). Other researchers gain enough access to attend meetings and generally to hang out (Ashcraft, 2001). Meanwhile, others conduct qualitative research that speaks to hot-button issues like sexual harassment – and they do it by interviewing stakeholders (Scarduzio & Geist-Martin, 2008) or by textually examining emails, training materials, or news articles (Lyon & Mirivel, 2011).

Contexts of organizational qualitative study may include profit-making organizations (Nike, Disneyland), governmental institutions (prisons, institutions in a military context), nonprofit organizations (Habitat for Humanity, the Red Cross), educational contexts, hospitals, or churches. Qualitative studies provide an insider's view on organizing – through examining meetings, power lunches, water-cooler chat, and after-hours parties.

Understanding cultures

Qualitative research is useful for understanding a range of societal issues that arise from particular cultural contexts (Drew, 2001; Covarrubias, 2002; LaFever, 2007). For example, in order to better understand tourist (mis)behavior, Schneider-Bean (2008) coupled the qualitative analysis of promotional material related to tourism with the on-site study of exotic vacation spots.

The qualitative analysis of today's stories and yesterday's historical documents is integral to understanding significant societal events such as social movements (Pompper, Lee, & Lerner, 2009). For instance, Haskins (2007) examined how people across the globe catalogued and wrote their own views of the 9/11 World Trade Center attacks, and by the same move uncovered how cultural members narrate their own history.

Furthermore, issues such as ethnicity, race, gender, and sexual orientation can be understood, critiqued, and transformed through contextual studies that examine how demographic categories are ever-changing and communicatively constituted (Trethewey, 2001). For instance, Lindemann and Cherney (2008) coupled a field study of quadriplegic rugby players with an analysis of the movie "Murderball," providing a fascinating examination of masculinity and disability.

Understanding mediated and virtual contexts

Finally, qualitative research is increasingly being used to study virtual and mediated contexts. Romantic relationships and the "hook-up" culture can be analyzed through websites such as Match.Com, E-Harmony, Facebook, and MySpace. Forums and chat-rooms open a window into marginalized cultures – such as those of drugs, or those of extreme thinness (Murguía, Tackett-Gibson, & Lessem, 2007). The best way to gather data from students and to learn about their communication tactics may be through text-messaging. Personalized blogs and podcasts can give insight into a number of contemporary issues, for instance teenager self-presentation (Bortree, 2005). Online data may also provide access to illegal, blasphemous, or stigmatized activities that may otherwise be unavailable.

In short, although qualitative analysis is linked to some disciplinary areas more than to others, it is a research method that is increasingly being used by a variety of researchers across topical areas. As reviewed above, qualitative research is salient for the understanding of personal, relational, group, organizational, cultural, and virtual contexts in a range of different ways.

Moving from ideas to sites, settings, and participants

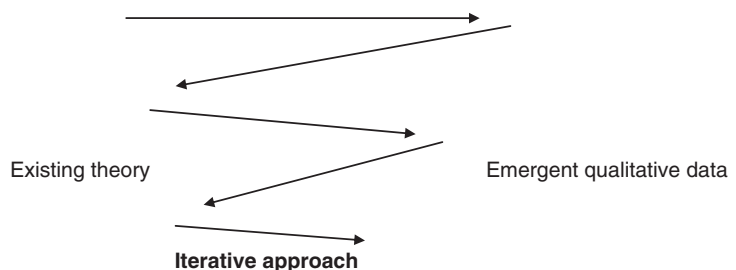
Some researchers choose a particular research site that fascinates them without knowing what to expect. For instance, researchers interested in medicine may hang out in a hospital's waiting room, unsure of what exactly they will end up studying. Potential foci may include the flow of patients in the waiting room, or the frequency of buzzers, beeps, or announcements broadcast across the loudspeakers. This open-ended approach is particularly worthwhile for brand new researchers who are perfectly content studying “whatever happens.” Other researchers begin by studying a specific phenomenon, defined in advance by some grant priority or by the desire to advance a particular line of research. In such cases, first they determine what they want to focus on, and only then do they find a scene.

A middle option is an **iterative approach** (Miles & Huberman, 1994), in which the researcher alternates between considering existing theories and research interests on the one hand, emergent qualitative data on the other (see Figure 1.1). In this scenario the researcher may first determine a general idea, then come up with several potential sites, and then gradually become more specific about the phenomena to be studied. For example, when my co-author Debbie Way studied a hospice, at first she was interested in burnout, then she learned that the theoretical lens of compassion suited the data more clearly (Way & Tracy, in press).

In determining a potential research site, it is important to remember that the phenomenon under study is not the same as the field of study. The **phenomenon** – or locus of study – is the issue or theme brought to bear by research questions (e.g. burnout, code switching behavior, socialization, terrorist activity, greeting behaviors). The **field** of study, in contrast, is the collection of spaces and places in which the phenomenon may be found and explored. So, for instance, a person interested in the phenomenon of “hazing” might be particularly attracted to studying groups that put new members through rigorous rites of passage. Potential fields of study could then include army boot camp, fraternity/sorority pledge periods, or the training of investment bankers.

Within the field there are **sites**, or specific geographical or architectural areas (e.g. a fraternity house), and within the site there are even more specific **settings**, which refer to

Figure 1.1 An iterative approach alternates between considering existing theories and research interests on the one hand, and emergent qualitative data on the other.



EXERCISE 1.1



Field/site brainstorm

The table below provides an example of systematically comparing and contrasting potential field sites and their advantages and disadvantages. In this table it becomes clear that there is no one perfect site but, instead, each one holds specific advantages and disadvantages. Creating your own table can help you brainstorm several potential sites and consider advantages and disadvantages to each.

Table 1.1 The “field” for this brainstorm consists of all the spaces and places where employees regularly show a negative or controlling emotion toward their clients/customers as a paid part of their job, and where doing so repeatedly may challenge their emotional well-being.

Potential Site	Prison	Bar or Club	Bill Collection
Potential Participants	Correctional officers	Bouncers	Collection agents
Potential Settings	Inmate booking area, prison lobby, inmate cafeteria, inmate pods	Front door	Call room floor; shadowing collector on street
Advantages	Emotions running high for those just arrested; complex scene; long-term employee–client relationship; current research suggests high burnout; very little research exists	Easy, immediate access; researcher could be a full participant by getting a job or pretending to act like a patron	Multiply-focused and intense sessions; wide range of emotions; interaction with client may be audio recorded
Disadvantages	One needs official permission and security check to enter scene; participants wary of researcher; really busy; no clear place to sit and watch; research may be intrusive	Routine, short-term interaction with customers; research exists (e.g. Scheibel, 1992); complex interaction more sporadic	Somewhat scripted; research already exists (e.g. Sutton, 1991)

To do Determine a field of study – a context or group that revolves around a certain issue, dilemma, or topic of interest. If you’re stuck, examples might include: (1) reunions/goodbye interactions; (2) rites of passage; (3) food purchasing and eating; or (4) sibling rivalry.

Then create your own table, where you fill in the potential site, participants, settings, advantages, and disadvantages.

the specific parameters of the space (e.g. the basement). Also, within each site there are different sets of **participants** – the focal people of the study (e.g. the alumni, the officers, the pledgers). A field consists of many potential sites, settings, and participants. However, some sites or participants will be more valuable than others for studying certain phenomena. I use the term **scene** to refer generally to the field, sites, settings, and groups of participants.

Sources of research ideas

Just as in learning to ride a bicycle or learning to paint a picture, the best way to learn qualitative research is by actually *practicing* it. Where should you begin? The first step is devising potential research ideas and considering the suitability of various contexts.

Some of the best ideas for qualitative research come from your personal life. Ask yourself: what has happened to me, or around me, that is particularly interesting or puzzling? Perhaps your life has been touched by certain religious practices, political beliefs, or health issues that encourage deeper reflection. Experiences such as travel, education, work, family, sports, or volunteering can also suggest venues for research. The best ethnographers read a lot about the world around them and live interesting, rich, and multi-faceted lives. They dip into these knowledge reservoirs for research inspiration.

Another good source for research ideas are societal problems or organizational dilemmas. For example, I first became interested in 911 emergency communications because of a number of highly publicized cases in which emergency help had not been dispatched in a timely manner. My colleague Karen Tracy and I entered the research with the goal to learn more about the behind-the-scenes interactions of citizen calls to the police and about how calls could go awry (S. J. Tracy & K. Tracy, 1998).

A third resource for research ideas is current events. Good ethnographers keep apprised of societal trends, policy debates, politics, and issues in which target populations are struggling or succeeding. They consistently read newspapers, magazines, websites, and blogs associated with their key interests.

A fourth resource for ideas are scholarly research texts. For example, “state of the discipline” research articles synthesize current theoretical concerns and provide suggestions for future work. These pieces offer guidance, a wealth of background literature, key theoretical advancements, and a ready-made study rationale. Good launching points for research inspiration can emerge from inconsistent findings, gaps in current theories, topics or concepts that have only been studied through certain methodologies, or the study of established theoretical concepts in new contexts. I encourage you to read widely from a variety of interdisciplinary sources in order to find ways to bridge and transform arguments in novel ways. What is “old news” to one group of scholars can be the hottest new way of approaching an issue in another discipline. The *lack* of research in a certain context or on a specific topic may also point to a promising area for study. However, scholars should be cautious about adopting a study simply because “no one’s ever studied this before.” Such a rationale invites counterargument. Furthermore, there may be a *very good reason* why something has not been studied in the past (maybe the topic or angle of research is not feasible, or not very significant).

Additional sources of ideas are the field contexts and the participants themselves. Participatory action research (Kemmis & McTaggart, 2005) is based on the notion that researchers should work together with research participants to help them address, make sense of, or improve upon local issues or dilemmas. In this way qualitative research is

CONSIDER THIS 1.1



Sources of research ideas

- 1 What are my ongoing interests and activities? What interests, confuses, or puzzles me?
- 2 What past personal or work experiences are appropriate for additional study?
- 3 What opportunities present themselves right now?
- 4 What organizational, societal, political, or community predicaments/dilemmas are ripe for investigation?
- 5 What are the hot topics being discussed in magazines, in blogs, and on websites associated with my research interests?
- 6 When I read about my favorite theories or scholarly topic areas, what are the inconsistencies? What is missing? What types of research are other scholars calling for?
- 7 How could a qualitative methodology provide new insight into an issue or concept that has historically been studied quantitatively?
- 8 What topics of research are primed to receive grant money from federal agencies or private foundations? What topics might I get paid to provide consulting on?

well positioned to address contextual priorities pinpointed by consulting, grant, and contract work (Cheek, 2005). At the same time, keep in mind that focusing on organizational research priorities – especially when the research is funded – increases the ethical and political complexities of the project. For instance, it is difficult to know what might happen if the organization suggests a certain research question, but in analyzing this question it turns out that low-power employees are required to provide information that negatively impacts their job security. Those new to qualitative research, in particular, are certainly encouraged to listen to contextual priorities for research inspiration, but they would be wise to avoid promising too much to research participants about their specific research foci.

Finally, when considering various topics or issues for study, it can be helpful to consider, design, and develop a list of advantages and disadvantages of several different research approaches. As human beings, we tend to **satisfice** – meaning that it is common to come up with a single decision that is merely adequate rather than with one that is optimal (Simon, 1997). By considering several potential research ideas, we are more likely to come up with a better, more creative, and smarter array of research options.

Compatibility, suitability, yield, and feasibility

Compatibility, yield, suitability, and feasibility are key considerations to entertain before diving into a qualitative research project (Lindlof & Taylor, 2011). Given that the researcher *is* the qualitative research instrument, it is important to consider your personality, demographic background, traits, and preferences. Important questions to consider are: How will I fit into the scene? How will I be accepted or regarded? How will I navigate, make sense of, or bracket my preconceived notions? Will my being different

or similar to the participants be helpful or problematic? What are the potential advantages and disadvantages of my subjectivity?

Good qualitative researchers think carefully about how they, personally, will experience research in a certain context, both *despite of* and *because of* who they are. For instance, a current employee who wants to study the organization where she is employed will have the advantages of already being “in” the scene and of understanding a wealth of background information. However, this same background limits fresh insight, and the researcher will have to navigate the power and personality issues that come with her position (e.g. interview responses will be affected by the fact that she is also an employee).

Some researchers prefer to study people who have similar subject positions (e.g. a triathlete studying a triathlon club). However, researching an unfamiliar group of people can provide a unique standpoint – offering insights that an insider would not have (e.g. an outsider might be able to better pinpoint the unique race day rituals that triathletes come to see as normal – such as wearing baggies on their feet as they slither into wetsuits). No matter the site, self-reflexive researchers carefully consider how their culture, age, gender, sexuality, and physical appearance will be interpreted by others. A white male Brit might find it more difficult to study a group of Middle Eastern women than would someone who has more similarities to the participants (Whitaker, 2006). At the same time, it’s important to weigh “fit” with other factors. When researchers only study people like themselves, this exacerbates the fact that huge portions of the population are remarkably underrepresented in academic scholarship.

In terms of identity, researchers should also critically consider their own ego and the extent to which they are willing to adapt in order for participants to accept them. Conquergood (1992b), for instance, moved into the “Big Red,” a Chicago slum neighborhood, and was treated as an outsider and impostor for a long time before he was able to finally gain the trust of the community and to conduct his intended research project with gang members. Researchers must thoughtfully consider whether they have the personal sustenance and resilience for the countless phone calls, follow-up emails, and “courtship rituals” required in order to get access to their chosen scene of study.

Another issue to consider is your level of passion and drive for the project. Qualitative research includes a wide range of emotions and challenges. As Lindlof and Taylor (2011) note, researchers face “stretches of confusing, disagreeable, or apparently pointless activity” in the field (p. 86). Your interest in the project must rise above and propel you through these moments of frustration, difficulty, and tedium. You are most likely to enjoy a project that is complex enough to keep your attention, but simple enough that you do not get overwhelmed and frustrated.

A good research project must also provide appropriate **yield** in terms of research results. Researchers should ask themselves a very practical question: *Will this study deliver my desired outcome?* Outcomes could include a class paper, a job experience, a thesis or dissertation project, research that will build a tenure-worthy research program, a project that attends to the priorities of a funded research grant, or a publication. Although pursuing qualitative research also has intrinsic joy, most of us must produce specific outcomes. Hence considering the potential yield of a study is crucial from the beginning.

The research project also needs to be **suitable**, in that it should encompass most, if not all of the theoretical issues and characteristics of interest in terms of the research topic or problem. When I was choosing directions for my dissertation research, I learned several key issues: (1) there was still much to understand about a concept called “emotional labor” (expressing emotion for organizational pay) and, although many studies had focused on cheery customer-service settings, few had analyzed employees

who got angry or had to remain stoic; (2) I wanted to study a significant social or organizational problem (e.g. burnout and turnover); and (3) I held an enduring interest in the notion of “total institutions” (24-hour organizations in which certain members never go home) (Tracy, 2000). On the basis of these considerations, a *suitable* group of participants would need to have the following characteristics: (1) perform emotional labor – preferably of a type that varied from traditional customer-service type settings; (2) experience challenges with burnout; and (3) work in a total institution. I chose to pursue research in prisons and jails – contexts that satisfy these criteria, and therefore were suitable.

Researchers must additionally ask whether a certain project is **feasible** or practical. Finding a site that is perfectly suited to your identity and to your research problem is unlikely if access to the site – or to the key informants – is impossible within the research timeframe. Researchers need to ask themselves tough questions about how quickly they might gain access and, more importantly, how long they need to be in the field before developing the relationships necessary to understand participants’ cultural practices, rules, and ways of being – especially when the context is very different from the researcher’s familiar territory. Qualitative research can take you to places far away, as it did for Sundae Bean, who studied tourist–host encounters in Belize (Schneider-Bean, 2008). However, Sundae pursued this study only after a year’s worth of planning and conducting a pilot study closer to home.

Gaining access to secretive organizations – such as the FBI, the border patrol, or backstage at Disneyland – can be interesting, but challenging. Gheeta Khurana (2010) studied Marriages of Convenience (MOCs) – arrangements in which homosexual South Asian Indians heterosexually marry another South Asian, yet secretly agree to carry on relationships with their actual homosexual partners. The MOCs are “convenient” because they allow participants to simultaneously please their family, yet maintain their romance with their “true” love – a person whom they fear would be rejected by their family. For obvious reasons, this population is largely hidden from view. In Researcher’s Notepad 1.1, Gheeta discusses how she negotiated access.

Despite the allure of hidden populations, when a researcher is new to qualitative research, focusing on issues or sites that are close to home can be easier. Many excellent research projects have emerged from public places like airports, amusement parks, college campuses, virtual worlds, rock concerts, and restaurants (see Bryant, 2010 for a study of community and technology usage on the city’s metro shuttle bus). Researchers can also fruitfully conduct research in a place that is local, yet not personally familiar; such was the case with Trujillo’s (1992) study of baseball and ballparks as American cultural institutions.

Finally, when thinking about a topic and context, I recommend that you seek advice. Other students may have leads. Professors or colleagues can provide a fresh viewpoint on a project’s advantages and disadvantages. Internet list-serves and forums provide quick input from specialists across the world. Given the role of peer review in many journal articles, it simply makes sense to get the opinion of others *before* spending hours, semesters, or years pursuing access to a context, collecting field observations, conducting interviews, and interpreting the data.

As you make decisions about your data and about the context of qualitative examination, I encourage you to consider the factors of compatibility, suitability, yield, and feasibility, as well as factors that ease or complicate research in the field (see Tips and Tools 1.1). These tips are especially relevant for those who are new to qualitative research, or have a specified time period within which to observe and cogently make sense of a data set.

RESEARCHER'S NOTEPAD 1.1



Feasibility challenges with hidden populations

By Gheeta Khurana, in her own words

I wanted to study Marriages of Convenience (MOCs) for my qualitative class project. Ideally, direct observation would have been my preferred method; however, queer South Asians engaged in MOCs aren't exactly running rampant, because that would defeat the purpose of the secretive arrangement. So, could this be feasible?

My first step was to locate the actual population, so I referred to a foundational article by Akram (2006) that discussed websites devoted to queer South Asians seeking mates for MOCs. I turned to Google, typed in several variations of the phrase *South Asian marriages of convenience* adding the terms *website*, *discussion forum*, and *post*. I came across a few relevant websites and began researching.

I chose preferred websites using criteria such as the number of postings, the recency of posts, and the site's aesthetic appeal. I then read the postings of individuals seeking MOCs that provided information regarding qualities the individuals were looking for in their spouses, in addition to the reasons why they needed MOCs. However, I also wanted to ask probing questions to better understand this population.

I waited for a few weeks before making my presence known, because I was worried they would feel as though I was violating their privacy or judging their choices. Then I created an information letter introducing myself as a researcher who had studied South Asian families and now wanted to gain insight into MOCs. Luckily, I received five responses from participants who agreed to complete an emailed open-ended questionnaire. One person even agreed to a phone interview. I was thrilled to receive responses, but at the same time I wanted more data.

After voicing my concerns to my instructor and cursing myself for not choosing a more feasible research project, I knew that I needed to find an alternative route. After a few sleepless nights, I realized that I could usefully augment my research by learning more about queer South Asians in general. Through doing some background research, I learned that queer South Asians feel as though their orientation is still taboo, and therefore they feel a lack of support from their community.

I again did some googling and I quickly found an organization dedicated to lesbian, gay, bisexual, and transgender South Asians. I sent an email to the organization's board members, introducing myself as a researcher and indicating that I had conducted interviews with queer South Asians engaged in MOCs but was eager for more insight.

As a result, I interviewed the president of the organization. This led to an interview with a South Asian civil rights coordinator, a therapist who caters to queer South Asians, and another board member. I was able to access first-hand accounts of being queer by listening to their tales of why they considered MOCs in addition to their stories of individuals who were in MOCs. Thus I gained a more holistic understanding by interviewing those pursuing MOCs, as well as others, who were just familiar with them.

In retrospect, I am grateful that I hit a dead-end after only getting five responses from the first MOC website. I'd be lying if I said there weren't instances when I wished I had chosen a more feasible project. However, those moments forced me to expand my research focus by finding new ways to get access to better understand MOCs. Granted, researching this hidden population took creative effort, but in the end I was able to piece the multiple perspectives together, which allowed my research to be more illustrative of the complexity of MOCs within the South Asian population.

TIPS AND TOOLS 1.1



Factoring the ease of fieldwork

A number of factors (Spradley, 1980) affect the relative ease of fieldwork. Here I provide examples of research contexts that are easier or trickier in relation to these factors. I encourage you to consider your own topic and how certain field sites might be easier or trickier.

Factor	Easier	Trickier
Simplicity	Single bus	Entire village
Accessibility	Street corner	Family dinner
Unobtrusiveness	Coffee shop	Prison
Permission requirements	Beach	Street gang or AA meeting
Frequently recurring activity	Flirting	Public drunkenness
Opportunity for participation	Open mike night	Courtroom

Moving toward a research question

Research questions are the core feature of beginning a qualitative research project. Qualitative researchers begin with the basic question: “What is going on here?” (Lindlof & Taylor, 2011). Of course, “here” may refer to various practices, contexts, cultures, groups of people, documents, or electronic sources. A phronetic approach would suggest that good initial questions include: (1) Where are we going? (2) Who gains, and who loses? (3) Is it desirable? and (4) What should be done? (Flyvbjerg, 2001). Along the way, researchers devise more specific research questions, such as:

- What are people saying? What are they doing? Are participants’ opinions and actions complementary or contradictory? What does this say about the scene?
- How is the scene changing over time?
- What rules or norms are research participants following? Resisting? Shaping?
- How does this population create and interpret messages? Consume media and construct news?

Many researchers hesitate to devise research questions before they enter the field. However, creating several questions can help you navigate an unfamiliar research context. These early questions provide orientation and a launching pad for action even if they do not replicate the scene’s exact territory. Once you begin to collect data and cue into the context, you’ll be able to better craft questions that guide interpretation and explanation. To illustrate the importance of research questions, I share a classic war story, created by Albert Szent-Györgyi, constructed as a poem by Holub (1977) and amplified into the following story by Karl Weick:

[A]young lieutenant of a small Hungarian detachment in the Alps sent a reconnaissance unit into the icy wilderness. It began to snow immediately, snowed for 2 days, and the unit

did not return. The lieutenant suffered, fearing that he had dispatched his own people to death. But on the third day the unit came back. Where had they been? How had they made their way? Yes, they said, we considered ourselves lost and waited for the end. And then one of us found a map in his pocket. That calmed us down. We pitched camp, lasted out the snowstorm, and then with the map we discovered our bearings. And here we are. The lieutenant borrowed this remarkable map and had a good look at it. He discovered to his astonishment that it was not a map of the Alps, but a map of the Pyrenees. This incident raises the intriguing possibility that when you are lost, any old map will do. (Weick, 1995, p. 55)

Indeed, you should not worry too much – especially in the beginning – about whether your research questions are “right.” Your general research interests and the context are enough to construct one or two guiding questions. In contrast to quantitative research, in which hypotheses are determined before data is collected, qualitative research questions can and should be influenced by the field and are usually modified over time. With preliminary research questions in hand, you can enter the scene with a sense of purpose, keep moving, notice new cues and update research questions along the way.

RESEARCHER'S NOTEPAD 1.2



Published examples of research questions

Although research questions that make it into published articles usually have changed multiple times before they are “in print,” the published questions nevertheless can provide inspiration.

In his study with wheelchair rugby players, Lindemann (2008) posed the following three research questions:

How are the tensions between inclusiveness and competitiveness embodied by players? How does the display of the disabled body in sport communicatively construct disability? How do the communicatively constructed meanings of disability inform quad rugby participation? (2008, p. 103)

Lutgen-Sandvik (2006) asked the following questions in order to obtain guidance for her study of the ways employees resist workplace bullying:

What resistance [techniques] do bullying-affected workers use to counter abusive treatment? What is the processual nature of resistance? How are case outcomes related to resistance? How does the dialectic tension between control and resistance produce contradictory meanings? (2006, p. 409)

And in their research into the ways firefighters are socialized into emotion labor expectations and norms, Scott and Myers (2005) asked questions that included:

What emotion management challenges do emergency response workers face? (p. 70); How are newcomers socialized to conform to emotion management rules? (p. 70); How do members of an emergency response organization actively participate in their own socialization to emotion rules? (2005, p. 71).

These research questions highlight the primary foci of the study and the ways the data are collected and analyzed may extend and illustrate previous understandings and findings.

Several tips can help you devise research questions. First, research questions can relate to issues that the participants find salient, problematic, or especially significant. This grounds the research question within the context. Examples of research questions tied to context include: “How do research participants communicate about the risks and rewards of their job?” “What situations spur family members to argue?,” or “Why do participants turn to this support group in their time of need?”

Second, research questions can also relate to certain theoretical or research areas: “How do participants resist the norms of appropriate behavior and what does this tell us about counterpublics theory?,” or “In what ways do the stories of stay-at-home fathers extend and contrast with existing theories of work–life balance?”

Third, I recommend limiting the number of research questions posed, at least in the beginning of the project. Many people wonder *how many* research questions are appropriate. There is no magic number, but I suggest having one to two overall research questions and several more specific ones. For instance, in researching 911 call-takers, my original guiding research question was: “How do emergency 911 call-takers manage emotion through communication?” Inherent in this overall question were smaller, embedded questions about the call-takers’ use of metaphor, jargon, and joking.

These tips are helpful to get you started, but qualitative research also demands that you play with the rules and perhaps, at some point, even forget them.



FOLLOWING, FORGETTING, AND IMPROVISING

As you embark on your research journey, I provide a number of rules of thumb and best practices. Clear guidelines about how to practice qualitative methodology are helpful for several reasons. First, given that many research areas are governed by positivist approaches, those who are conversant with their own methodological guidelines can enter a conversation of more traditional rules-based paradigms. Being fluent in an established language of systematic practices makes it easier to enter into dialogue with a variety of people. By speaking the language of rules and best practices, qualitative researchers can frame their research so that it may be more likely to be read and appreciated by audiences that might otherwise regard qualitative research merely as “a good story.”

Second, an explicit focus on best practices is crucial for effectively teaching qualitative research. According to research on learning (Dreyfus, Athanasiou, & Dreyfus, 1986), people rely heavily on rule-based structures in order to learn. Learning a clear structure opens a path to follow, which is especially important for those who have little qualitative research experience.

Third, following rules and best practices is a common way to become expert in many interpretive arts. Musicians learn scales and chords as methods that prime them for

improvising or jamming with others. Cooks follow tried-and-true recipes as preparation for experimenting with new flavor and texture combinations. In short, when people are new to a certain field, following clear guidelines can help them improve and gain credibility even before they are considered experts themselves.

So there are good reasons for learning best practices. However, I also believe that strict guidelines can be constraining and problematic. Rules can inhibit playing and having fun – and it is important to have fun in the attempt to learn an art or skill. This is especially true when the new craft is difficult, as in the case of qualitative research methods. Without some aspect of pleasure, fun, or playfulness being involved, most people will not keep practicing long enough to become expert.

Throughout this book I endeavor to clarify and illustrate guidelines for engaging in qualitative methods. At the same time, there is much of qualitative research that cannot be explicated in rules, best practices, or even in a textbook filled with anecdotes and stories. To become “good,” you have to get out in the field, work with other experienced qualitative researchers, and sometimes forget and/or play with the rules. To provide some insight into situations primed for play, I revisit this notion of “following, forgetting, and improvising” throughout the book.

In summary

This chapter has introduced qualitative methods, discussed the importance of self-reflexivity, context, and thick description, introduced the notion of phronetic research, and provided tips for choosing a topic and for devising research questions. Furthermore, it has offered some guidance on fol-

lowing, then forgetting the rules. Chapters 2 and 3 give additional theoretical grounding. Chapters 4 through to 14 make up the phronetic heart of the book, providing an in-depth understanding of how to navigate qualitative methodology in ways that help ensure that our research matters.

EXERCISE 1.2



Three potential field sites

We humans often “satisfice,” going with the first workable decision we stumble upon, rather than searching for the “best” possible decision. In the effort to determine a “better” qualitative project, describe three potential field sites and/or group of participants for your study. For inspiration, consider your personal interests and experiences, questions in the literature, hot topics, or issues that confuse and/or energize you. For each item, discuss:

- 1 the site or the people you want to work with and the general research issue(s) you want to explore;
- 2 how the site or the people of interest are complementary with your theoretical, practical, or professional interests;
- 3 how your background and your experience affect the ability to gain access to these contexts or people;
- 4 what logistical steps you must take to access this context or group.

KEY TERMS

- **autoethnography** the systematic study, analysis, and narrative description of one's own experiences, interactions, culture, and identity
- **feasible** the research project should be practical, given the time and resources available
- **field** all the types of spaces where one could observe a phenomenon of interest; it consists of many potential sites, settings, and participants
- **iterative approach** the researcher alternates between considering existing theories and paying heed to emergent field site data
- **participants** the focal people of the study (e.g. the alumni, the officers, the pledgers)
- **phenomenon** the locus or topic of study
- **phronetic research** research that is concerned with practical contextual knowledge and is carried out with an aim toward social commentary, action, and transformation
- **satisfice** the common practice of coming up with a decision that is merely adequate rather than optimal (Simon, 1997)
- **scene** a catch-all term that refers to the field, sites, settings, and groups of participants
- **second-order interpretations** researchers' interpretations or explanations of participants' interpretations or explanations
- **self-reflexivity** the practice of carefully considering the ways in which the researcher's background, points of view, and role impact the researcher's interactions within and interpretations of the research scene
- **setting** the specific parameters of the space of study within a field and a site (e.g. the basement)
- **site** a geographical or architectural area within a field (e.g. a fraternity house)
- **suitable** the research project should encompass most, if not all of the theoretical issues and characteristics that are of interest in terms of the research topic or problem
- **thick description** a concept coined by Clifford Geertz (1973), which captures the fact that researchers immerse themselves in, and report on, particulars before moving toward grander statements and theories
- **yield** the specific desired research project outcomes (e.g. a class paper, a dissertation project, a publication)