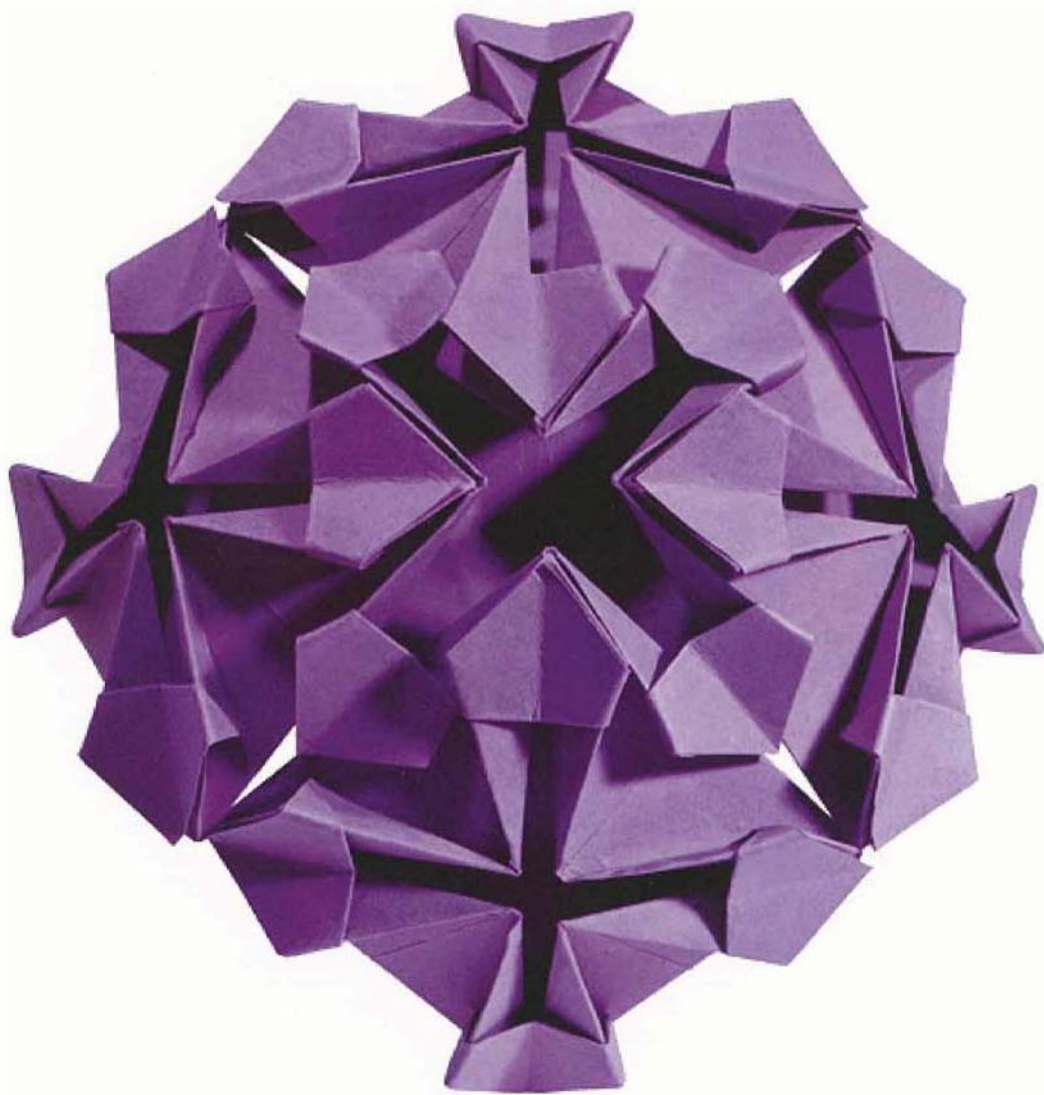


# QUALITATIVE METHODOLOGY

*A Practical Guide*



EDITED BY  
**JANE MILLS & MELANIE BIRKS**



# Qualitative Methodology

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# **Qualitative Methodology Practical Guide**

**Jane Mills and Melanie Birks**



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# Notes on editors and contributors

**Robin Adeney** completed her doctorate at the University of Regina in Saskatchewan in 2011 using a narrative inquiry methodology for her research design on children's play. She has worked as a singer/songwriter, storyteller, pre-school, kindergarten and grade one teacher and museum educator. Her varied interests include children's play, histories of childhood, the arts as ways of knowing, folklore and games, inclusive education, and understanding children's culture. Recently, Robin's attention shifted to include post-secondary education and she is currently employed with the provincial government in the colleges and private vocational schools area.

**Melanie Birks** is recognised internationally for her work in grounded theory methodology. In addition to the text co-authored with Jane Mills, Melanie has published numerous journal articles that address methodological processes in qualitative research, in particular in grounded theory. She has a number of other publications in the form of books, book chapters and peer reviewed articles. Melanie has worked and researched extensively in the area of nursing education and is passionate about instilling a culture of evidence based practice in health care professionals both in Australia and overseas. Melanie is a recipient of the Australian Defence Medal for her work in educating Royal Australian Air Force personnel. She has spent time teaching and researching in the international environment, particularly in East Malaysia, which was the setting for her PhD research.

**Simon Burgess** received his PhD in moral and political philosophy from Monash University in 2006. Since then he has worked in policy development, project management, and academia. He is currently the head of Central Queensland University's Master of Indigenous Studies program. He has published in philosophy, curriculum evaluation and workplace management but his principal research interests are in philosophy, particularly as it relates to moral evaluation and the wider social world.

**Ysanne Chapman** is an independent scholar and consultant in education. She currently holds adjunct appointments with James Cook University, Charles Sturt University and Monash University in Australia. Professor Chapman has an extensive history in academia including experience in working in the international environment. Professor Chapman has produced numerous books, book chapters and journal articles, and has been commissioned to co-author further books, including a textbook on communication.



Bob Dick is an independent scholar, an occasional academic, a consultant and facilitator in the fields of participative community and organizational change and evaluation, and a concerned citizen. For the past 40 years he has helped people (and himself) improve their own performance and satisfaction, and that of their organisations and communities. As educator, consultant and facilitator, Bob has used action research, action learning and participative methods in communities, organisations and university classrooms. He has published in the areas of facilitation, action research, and change. Much of his current work has involved the use of action research and action learning to bring about change, leadership development, and the enhancement of organizational and community resilience.

Urmitapa Dutta is an Assistant Professor of Psychology and a member of the graduate committee of Peace and Conflict Studies at the University of Massachusetts Lowell. Informed by a critical social justice agenda, her research tries to understand and address marginality where it is intimately connected to violence. Urmitapa's doctoral dissertation was a critical ethnographic investigation of the struggles over cultural representations and their relationship to varied expressions of ethnic violence in Northeast India. As part of this project, Urmitapa has worked with youth to develop innovative, community-based approaches to address everyday violence and to promote 'everyday peace'. While continuing her critical ethnographic research in Northeast India, Urmitapa's current research also focuses on developing participatory action research projects with people from marginalized contexts in the greater Boston area. She was recently awarded the 2012 Exemplary Diversity Scholar Citation from the National Center for Institutional Diversity, University of Michigan Ann Arbor.

Karen Hoare is a Nurse Practitioner for Children and Young People and partners with five general practitioners in a clinic in South Auckland. Additionally she has a joint appointment as a Senior Lecturer across the School of Nursing and the Department of General Practice and Primary Health Care within the University of Auckland. Karen is developing her research expertise as a constructivist grounded theorist. Originally trained as primarily a children's nurse at Great Ormond Street hospital, London, her experiences working with children and young people span the globe, emigrating to New Zealand from the UK in 2003. She has lived in South and West Africa and also worked in Peru. In 2000 she set up the charity and company 'Development Direct Global Partnerships' (see [www.developmentdirect.org.uk](http://www.developmentdirect.org.uk)), the aim of this organization is to alleviate global poverty and improve the health of children.

Janice Huber is an Associate Professor in Preservice and graduate teacher in education at the University of Regina. Growing from doctoral and postdoctoral study, her relational narrative inquiries and coauthored publications, including *Composing Diverse Identities: Narrative Inquiries into the Interwoven Lives of Children and Teachers* (Routledge, 2006) and *Places of Curriculum Making: Children's Lives in Motion* (Emerald, 2011), continue to explore narrative understandings of identity in relation

with the curriculum-, identity-, and assessment-making experiences of children, families, and teachers. She is a co-author of *Warrior Women: Remaking Postsecondary Education Through Relational Narrative Inquiry*, which explores the experiences of diverse Aboriginal teachers in Canada as they navigate postsecondary, public and First Nation school contexts (Emerald, 2012). In 2006 she was awarded the Early Career Award of the American Educational Research Association Narrative Research Special Interest Group.

Debra Jackson has been an academic nurse for over 15 years. An outstanding scholar and researcher, Professor Jackson has a strong international profile and her experience and expertise includes leading two impressive research programs in women's and family health and workforce development and adversity. Much of her research has been funded by national competitive grants. She is an experienced supervisor of research higher degrees. She has examined numerous theses for national and international universities, and has supervised more than 20 research students to completion. In 2007 Professor Jackson won the Vice Chancellors Award for Outstanding Research Higher Degree Supervision (UWS). Professor Jackson has been published in over 250 publications including journal articles, books and book chapters. She has co-edited three widely used textbooks, two of which are into their 3rd editions. Professor Jackson is an experienced writing mentor and coach. She is an active Editor and Editorial Board member and peer reviewer for Australian and international journals and funding bodies.

Marianne LeGreco is Associate Professor in the Department of Communication Studies at the University of North Carolina at Greensboro. She focuses her scholarly work on organizational and health communication, discourse tracing, and community-based research methods. Her interests in practical approaches to qualitative research coincide with her work on discourse tracing. This methodology calls attention to discursive practices, social change, and multi-level analysis. Dr. LeGreco applies her theoretical and methodological work primarily in food-related contexts including community-based food programs, food policy, and the construction of healthy eating practices. Her curiosity around food stems from her family, many of who have worked as farmers, chefs, catering directors, and nutritionists.

Patrick J. Lewis is a storyteller-teacher-researcher working with children, undergraduate and graduate students in Early Childhood and Elementary in the Faculty of Education at the University of Regina.

Seán L'Estrange is a Lecturer in Sociology at University College Dublin whose main research areas include the study of nationalism, religion and science. He is currently researching a book on classical political sociology.

Jane Mills is an internationally recognized grounded theorist with a background in community nursing practice. Jane has authored over 100 peer reviewed publications including journal articles, book chapters and books, many of which have focused on

qualitative research methodologies. Her recent publication *Grounded Theory: A Practical Guide*, co-authored with Melanie Birks has been particularly well received. Since 2009, Jane has been employed at James Cook University in the tropical region of far north Queensland, Australia. As the Director, Centre for Nursing and Midwifery Research Jane's research focuses on teaching and learning in the tertiary setting, public health issues including tropical disease prevention, primary health care and rural health workforce. As well, Jane is an experienced higher degree supervisor and has examined higher degree theses for both Australian and international universities. Jane is the recipient of a number of awards including an Australian Government Office of Teaching and Learning Citation for Outstanding Contributions to Student Learning in 2012, and a National Health and Medical Research Council Primary Health Care Post-doctoral Fellowship (2007–2009).

Eamonn Molloy is an accomplished scholar, who is currently engaged in teaching and research at Pembroke College, University of Oxford. Eamonn has held academic posts at the Universities of Warwick, Bath and Lancaster. He has worked on collaborative research projects with numerous Government bodies including the National Health Service, Department for Education and Skills, Department for International Development, Natural Environment Research Council and the Economic and Social Research Council. He has also worked closely with private sector organizations including Cadbury Schweppes, Unilever, United Utilities, BNFL and major mining, oil and gas companies in South Africa and Mozambique.

Gayatri Moorthi is an interdisciplinary health researcher, who is the Project Supervisor and Ethnographer for the IDU Peer Recruitment Dynamics and Network Structure in Respondent Driven Sampling project. The project is working with high risk injecting drug users in Hartford, CT. Her research interests include harm reduction, drug use, HIV risk, health policy, qualitative research methods, critical medical anthropology and public health. She recently concluded her dissertation research, a multi-sited ethnography, which examined the harm reduction policy and interventions in New Delhi, India. The research evaluated the efficacy and impact of these measures on injecting drug users as well as the dynamics of a peer driven model of intervention. She has worked on projects involving vulnerable families and communities, at risk foster children, and schools, both in India and the US. She aims to continue working in the area of public health, to fuel practical solutions for community concerns.

Martin Müller has been Assistant Professor for Cultures, Institutions and Markets at Universität St. Gallen in Switzerland since 2009. He read for his MPhil in Development Studies at the University of Cambridge and received a PhD in Human Geography at Goethe-Universität Frankfurt am Main. His work engages with post-structuralist theories, particularly discourse theory and actor-network theory, often through an ethnographic lens. His current research examines the governance of the Olympic Games and the perception and management of natural disturbances such as wildfires or insect pests in protected areas. His regional focus is on the post-Soviet



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Russell Ó Riagáin is currently a Benefactors Scholar of St John's College, Cambridge. He is working on a PhD that deals with the processes, both political and cultural, associated with colonialism by examining the changes in the control over ideological, military, economic and political resources as evinced in settlement form and patterning in the landscape in Scotland and Ireland in the Iron Age and medieval period, c.500 BC to c.1500 AD, taking an approach marrying archaeological, historical, geographical and sociological methods. Recent publications include the editing of a thematic issue of the *Archaeological Review from Cambridge* on the relationship between archaeology and the (de)construction of national and supra-national political configurations, a co-authored article in the same issue dealing with the relationship between archaeology and nationalism in Ireland and Romania, the relationship between literary texts and social history, and various articles on Neolithic and medieval secular and ritual buildings.

Michelle Redinan-MacLaren has experience in hospital and community health social work, community development, health promotion, NGO management (including refugee settlement) and more recently public health research. Michelle has had the privilege of living and working in rural and remote Australia (including Torres Strait Islands), rural New Zealand, Kosovo, Solomon Islands and Papua New Guinea (PNG). Michelle is passionate about working in the Pacific, especially with women. Michelle is currently undertaking her PhD using a grounded theory methodology. In partnership with colleagues in PNG, Michelle is exploring the impact of male circumcision practices for women in PNG, including women's risk of HIV transmission. Michelle is also working with colleagues in PNG and Solomon Islands to explore church-based responses to HIV (PNG), research capacity strengthening utilising decolonising methodologies (PNG and Solomon Islands) and action research/action learning.

Sonali Shah's research adopts different qualitative methodologies to examine the impact of public policy on the private lives of disabled people over historical time and in a national and international context. She is the Principal Investigator on a collaborative ESRC funded project, with Prof Mick Wallis (School of Performing Arts and Cultural Industries) to transmit oral history texts of disabled people, generated through social scientific disability research, to 21st-Century secondary school audiences via different performance methods (theatre and installation). This work is based on material from her Nuffield Fellowship and recently published co-authored book *Disability and Social Change: Private Lives and Public Policies* (2011, Policy Press) which combines biographical narratives and historical policy analysis to explore social changes in the lives of disabled people from the Second World War to the present day. Sonali is the sole author of *Career Success of Disabled High-Flyers*

(2005, Jessica Kingsley Publishers), and *Young Disabled People: Choices, Aspirations and Constraints* (2008, Ashgate). She is also a tutor on the Distance Learning Masters in Disability Studies and teaching on different programmes across education, medicine, social policy, psychology and disability studies. Her teaching interests focus on disability and social policy, particularly in relation to childhood and family, education and employment.

Allison Stewart is an Associate Fellow at the Saïd Business School, University of Oxford, and a doctoral graduate of the Institute for Science, Innovation and Society, and the BT Centre for Major Programme Management at the School. Her research focuses on sharing knowledge and ignorance between major programmes, with an empirical focus on the Olympic and Commonwealth Games. Allison held a lectureship in Management at Christ Church, Oxford from 2009–2012. She completed her MSc in Management Research at the Saïd Business School and earned her Bachelor of Commerce degree with a major in organisational psychology from McGill University in Canada. Allison is now a Capital Projects Manager at BG Group, and has previously worked at a number of global consulting organisations including Deloitte and Accenture, where she focused on organisation design and change management for private and public sector clients.

Karen Tracy is a discourse analyst who studies and teaches about institutional talk, particularly in justice, academic, and governance sites. She is the author of three books. Her first, *Colloquium: Dilemmas of Academic Discourse* (1997), was the recipient of the Outstanding Book Award given by the Language and Social Interaction Division of NCA. The second, *Everyday Talk, Building and Reflecting Identities* (2002), is a text used in college classes that explores how discourse, cultures and identities link. A second edition is underway. Her most recent book is *Challenges of Ordinary Democracy* (2010, Penn State University Press), a 35-month case study of the meetings of a school board and its community. Her current project involves analysing discourse about same-sex marriage in state supreme courts doing oral argument and public hearings of legislative bodies.

Kim Usher is Professor of Nursing and Head of School of Health at the University of New England. Kim's research areas of interest include psychopharmacology and the health of people with mental illness, chronic illness, the psychosocial impact of emergencies and disasters, adolescent substance use and the impact on the family unit, alcohol related injuries, family centred care and family carers, consumer experiences in health services, and workforce issues. During her time as an academic, Kim has developed an interest in research methodologies, including the use of innovative methodologies. Kim has published extensively in the nursing and health related literature and has co-authored numerous book chapters. In addition, Kim has supervised 20 PhD students to completion and has many current students.

Yoland Wadsworth has been a pioneer practitioner, facilitator and theorist in the development of transformative research and evaluation methodologies, including



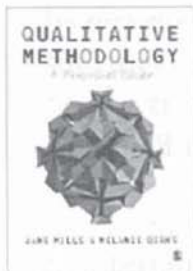
participatory, dialogic and 'whole systems' action research in health, community and human services for 38 years. She has authored Australia's best-selling texts *Do It Yourself Social Research* and *Everyday Evaluation on the Run* and the most recent work in this methodology trilogy: *Building in Research and Evaluation: Human Inquiry for Living Systems* (all 2011). She is an Adjunct Professor with the Centre for Applied Social Research, RMIT University; Hon Principal Fellow with the University of Melbourne's McCaughey VicHealth Centre, and Distinguished Fellow of the Action Research Center, University of Cincinnati. She has received the Australasian Evaluation Society's ET&S Award for an 'outstanding contribution to evaluation in Australia' and in 2007 was made a Fellow. She is a past president and life member of the international Action Learning, Action Research Association.

Karen Yates is a registered nurse and registered midwife, with a strong interest and background in midwifery clinical care, education and maternity service provision. Karen completed initial nursing and midwifery education in the hospital setting and has since been awarded a post-registration Bachelor of Nursing, Master of Nursing, Graduate Certificate of Education (Tertiary Teaching) and Doctor of Philosophy. Karen has worked in both private and public settings and in both regional and rural facilities. Her roles in these facilities included clinical and advanced clinical practice roles, education, senior management and project administration. Karen has worked for James Cook University on a sessional basis for over ten years and commenced a permanent position as Lecturer in 2012, coordinating subjects at both undergraduate and postgraduate levels. Karen completed her PhD in 2010 using a phenomenological approach to research the experience of midwives who work in a dual role as midwife and nurse in rural far north Queensland. Her research interests are in rural and remote nursing and midwifery workforce, models of maternity care and midwifery practice. Karen is a member of the Australian College of Midwives and the Australian College of Nursing.

Mary Isabelle Young is *Anishinabe Kwe* from Bloodvein First Nation. She received her early education, Grades 1–8, in Bloodvein, Manitoba. She attended residential school for three years and graduated from Kelvin High School in Winnipeg. She obtained her Bachelor of Arts from the University of Winnipeg, Post-Baccalaureate in Education and Masters of Education from the University of Manitoba. She completed her PhD in First Nations Education from the University of Alberta. Notwithstanding these degrees, Mary consistently honours the ways her parents taught and educated her. She believes they were truly her first teachers. Her parents were the ones who encouraged her and insisted she speaks *Anishinabemowin*. In 1984 Mary began as a Native Student Advisor and became the first Director of the Aboriginal Student Services Centre at the University of Winnipeg. She is currently an Assistant Professor in the Faculty of Education at the University of Winnipeg. Mary is the author of *Pimatisiwin: Walking in a Good Way: A Narrative Inquiry into Language as Identity* (Pemmican, 2005). She is a coauthor of *Warrior Women: Remaking Postsecondary Places Through Relational Narrative Inquiry* (Emerald, 2012).

# QUALITATIVE METHODOLOGY

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# Preface

Jane Mills and Melanie Birks

The aim of this book is to provide a practical guide to the very early stages of designing a qualitative research study, with readers introduced to concepts that are the building blocks of this process. Qualitative methodologies as opposed to qualitative methods are the main focus of this book although we do briefly address common methods used in each to provide context. Elsewhere (Birks and Mills, 2011), we define the difference between methodology and methods as follows:

Stemming from a congruent philosophy, a methodology is a set of principles and ideas that inform the design of a research study. Methods, on the other hand, are practical procedures used to generate and analyse data. (p. 4)

A research design therefore includes three components: philosophy, methodology and methods. There are many excellent research methods books (Flick, 2009; Nagy Hesse-Biber and Leavy, 2011; Silverman, 2009, 2011) providing guidance on the 'nuts and bolts' of conducting a qualitative study, however before heading out into the field, there is a lot of important 'thinking' work that needs to be accomplished to make sure the mechanics of a research study successfully generate quality data that meet the aim of the study. Methodology is all about thinking, reflecting and positioning yourself as a researcher so that you are both informed and confident in implementing the subsequent research design to achieve a quality outcome. As Denzin and Lincoln (2011) state 'the question of methods begins with the design of the qualitative research project. This always begins with a socially situated researcher who moves from a research question, to a paradigm or perspective, to the empirical world' (p. xi). In this book we will challenge and support you to locate yourself philosophically and methodologically in relation to your qualitative research question prior to entering the field.

Part I addresses the foundations of qualitative research. We introduce the development of qualitative research over time, and address the concept of a generic qualitative research process. The first building block of a qualitative research study is writing a research question that works, followed by an exploration of the idea of practical philosophy as a place to begin positioning yourself methodologically. The differences between methodology and methods, and the impact that choosing a particular philosophical stance and methodology can have on how methods are used and the resultant outcome generated, will be illustrated through the use of a number of examples in the final chapter in this section.

Part II scaffolds the reader's learning by examining eight qualitative methodologies: action research, discourse analysis, ethnography, grounded theory, historical research, case study, narrative inquiry and phenomenology. Choosing methodologies for inclusion in this text was an arbitrary process guided by our experiences of teaching, listening to international conference presentations and reading both journal articles and books. A recent analysis of articles published in *Qualitative Health Research* between the years of 1999–2007 supports the majority of our choices, ranking the most popular research designs in the following order: grounded theory, phenomenology, ethnography and narrative analysis (Shin et al., 2009). Case study and historical research we consider important as they offer researchers the methods necessary to capture, and most importantly contextualize, the experience of individuals and communities during a particular point in time, while action research creates a space where researchers can work with participants to develop both understanding and incremental change. An examination of discourse analysis, with its roots in post-structural and postmodern thinking, provides the reader with an opportunity to consider the relevance of qualitative enquiry denoting the 'humanist individual' (Adams St Pierre, 2011) possessive of agency and usually the subject of many of the other seven methodologies discussed in Part II. We are the first to acknowledge however, that qualitative research studies are never as clear-cut as this list makes out. Kincheloe (2001), famously extends the discussion first posited by Denzin and Lincoln (2000) that the work of a qualitative researcher is that of a bricoleur or a 'handyman or handywoman who makes use of the tools available to complete a task' (Kincheloe, 2001: 680). Often, qualitative researchers will draw upon a range of research traditions in order to best answer the question they pose, however it is the congruence of the philosophical underpinnings with the methodology and methods adopted that makes for a rigorous design, an argument we will extend in Chapters 3, 13 and 14.

Each chapter in Part II is written using an identical format to enable easy comparison between different aspects of each qualitative methodology and includes:

- History of the methodology
- Philosophical underpinnings
- Positioning the researcher
- Aligning philosophy and methodology with purpose
- Data generation and collection
- Analysis of data
- Quality and rigour
- Presentation and dissemination of findings

When reading Part II, a solid qualitative research question formulated as an outcome of Part I can be used as the basis for a cross methodological examination. What would it mean if phenomenology as opposed to ethnography is used to answer the question posed? How does grounded theory compare to action research from the perspective of positioning the researcher? Clearly, this book will not provide all the answers to these types of questions relating to each of the qualitative methodologies included, however it's a starting point, with some signposts about

where to go next. Being a new qualitative researcher can be difficult and sometimes a simple explanation provides enough direction to start the proverbial 'journey' to acquire knowledge and skills on the right path, rather than getting lost and taking a lot of time consuming wrong turns before even getting going.

Part III examines planning a qualitative study in detail. Concrete strategies for writing a full, qualitative research proposal, including an ethics application, are provided. Processes for appraising the quality of your own and others' qualitative research findings are addressed, while the final chapter discusses current debates in qualitative research using the theory of generational difference as a framework for discussion. The politics of evidence, causality and impact, and the challenges faced by Generation Y are explored in the context of qualitative research.

Throughout the book there are a number of recurring features to support the reader's knowledge and skill development in qualitative research. Case studies titled 'windows into' illustrate particular points made in the text. Contributors to the 'windows into' series, speak from their own experience about the pragmatics of conducting a qualitative research study. Activities are provided to prompt reader activity and help connect their own potential study to theory. Key points from each chapter are summarized to give a 'snapshot' of each methodology for the purpose of succinct comparison.

We wish to thank our families, Hew, Emma and Alec Mills and Benjamin Birks for their continued, patient support of our investment in scholarly discourse. We also wish to acknowledge our mentors, Karen Francis and Ysanne Chapman, along with our colleagues and students who inspire us to continue to make a practical contribution to the qualitative methodological literature. We also thank the contributors to this book and our supportive and efficient team at SAGE, Patrick Brindle, Jai Seaman and Anna Horvai who have been instrumental in bringing this project to fruition. To those who find value in our contribution, we extend our appreciation and commitment to continue to make a difference in this field.

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