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Contemporary Approaches to Qualitative Research: Andragogical Strategies for Teaching And Learning

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Abstract: This inquiry provides practical suggestions for teaching and learning qualitative research methodology. Important components of qualitative research design/implementation are identified and strategies to guide novice qualitative researchers are outlined.

Keywords: qualitative research, qualitative methods

Introduction

Often considered a less scientific alternative to historically more accepted quantitative approaches to social and educational research, qualitative research has rapidly gained popularity and credibility across a wide range of disciplines and settings particularly in practice-based fields such as education, adult education, social work, and health care. Based on the experiences of the co-authors who have co-taught introductory and advanced courses in qualitative research at a large, research-intensive university, we offer practical guidelines for teaching and learning the design and implementation of qualitative research. We address several topics key to these efforts and provide resources and tools useful for researchers and practitioners interested in applying qualitative research to the study of topics germane to adult education.

Characteristics of Qualitative Research

Qualitative research can be viewed as an umbrella term that encompasses a family of approaches based on inductive reasoning, achieving an in-depth understanding of participants' point of view, collecting data in natural settings, long-term immersion by researchers in the field, thick and rich description of the studied phenomenon, a concern with process, nonrandom, purposeful sampling, the researcher as the primary data collection instrument, an emergent and flexible design, and the use of multiple forms of data and perspectives (Babchuk, in press; Bogdan & Biklen, 2007; Creswell & Poth, 2018; Denzin & Lincoln, 2018; Lichtman, 2013; Merriam & Tisdell, 2016). This process enables the researcher to personalize the research process in a way not easily achieved through quantitative designs, yet demands its own set of procedures and techniques, criteria for assessing the integrity of the research, and implications for practice. Moreover, it generally relies upon different epistemological frameworks shifting the researcher's perspective or worldview on a continuum from positivist toward post-positivism, interpretivism, or critical theory (Lincoln, Lynham, & Guba, 2018; Neuman, 2011).

History and Epistemological Orientations of Qualitative Research

The history of qualitative research is rooted in the disciplinary perspectives of anthropology and sociology, first with the iconic pioneering fieldworkers in anthropology studying remote (to them) cultures, and later with "Chicago School" sociologists who borrowed their methods and applied them to the study of social phenomena in the U.S. By the 1960s, what came to be known as the "qualitative revolution" (Babchuk, 2011; Charmaz, 2000; Deegan, 2007; Denzin and Lincoln, 1994) had shaken the research community and a major retooling of the research landscape was undertaken. Seminal works such as Becker, Geer, Hughes, and

Strauss' (1961) *Boys in White*, Glaser and Strauss' (1967) *Discovery of Grounded Theory*, Garfinkel's (1967) *Studies in Ethnomethodology*, Turner's (1967) *The Forest of Symbols*, Blumer's (1969) *Symbolic Interactionism*, Geertz's (1973) *The Interpretation of Cultures*, Guba's (1978) *Toward a Methodology of Naturalistic Inquiry in Educational Evaluation*, Spradley's *Ethnographic Interview* (1979) and *Participant Observation* (1980), and Lincoln & Guba's (1985) *Naturalistic Inquiry*, influenced a new generation of scholars (Babchuk, in press). By the 1990s an explosion of journals and textbooks focusing on the conduct and refinement of these methodologies had emerged that continues to the present (Barrett, 2009). Most contemporary textbooks (e.g., Bailey, 2018; Charmaz, 2014; Creswell & Poth, 2018; Lichtman, 2013; Marshall & Rossman, 2016; Merriam & Tisdell, 2016; Mills & Birks, 2014) cover topics such as history, ethics, epistemology, and components of qualitative research design and implementation, and each outline several contemporary approaches such as ethnography, grounded theory, case study, phenomenology, narrative, etc. (see Denzin & Lincoln, 2005, Erickson, 2018, and Vidich & Lyman, 2000 for a more detailed history of qualitative research).

Aspiring qualitative researchers also need to become familiar with epistemological orientations, perspectives, worldviews, or paradigms that permeate all aspects of the research design from selection of a research problem and topic to the conduct and reporting of the research itself. For teaching this foundational aspect of qualitative research we have found Neuman's (2011) overview of three alternative approaches (or ideal types) to social science (i.e., positivist, interpretive, and critical) as well as feminist and postmodern approaches particularly useful, as is Lincoln, Lynham, and Guba's (2018) and Creswell and Poth's (2018) detailed treatment of this subject. As alluded to above, qualitative research typically subscribes to a different set of epistemological assumptions than does quantitative research.

Teaching the Design and Practice of Qualitative Research

In addition to understanding the definitions, characteristics, history, and epistemological aspects of qualitative research, there are a number of important considerations to take into account through all phases of design and implementation. In the co-teaching of introductory and advanced qualitative research methodology courses, we have utilized a Qualitative Research Design Checklist (see Babchuk in press, Babchuk & Badiee, 2011; Babchuk & Wassenmiller, 2012) developed by one of the co-authors and used in several courses across departments and colleges at our host institution (and see Creswell & Guetterman, 2019, p. 288 who provide a similar checklist). This has been particularly useful for graduate students working on masters theses and doctoral dissertations and has wide applicability for any researcher utilizing a qualitative design. Below we have presented a more detailed version of this checklist in bullet form and have elaborated upon it accordingly. Important considerations include:

- The title of the research project should indicate the qualitative design employed and the central focus of the study. There may also be reference to the participants;
- The introduction should identify the research problem and provide a problem statement stating why it is important topic to study and why the study is needed;
- The qualitative purpose statement is a central component of the research study and should be succinct, to the point, and state the type of design, participants, and site where the research will take place. Considered the most important aspect of a research design by Creswell and Poth (2018), these authors provide “scripts” for writing purpose statements for narrative, phenomenology, grounded theory, ethnography, and case study;

- The qualitative research central or “grand tour” (Spradley, 1980) question restates the purpose statement in question form and must be consistent with the goals and rationale of the study, feasible, well-written, succinct, and analytically congruent. Sub-questions break this larger question down into component parts;
- Relevant literature must be referenced in the introduction and statement of the problem section and then elaborated in the findings and/or discussion/conclusion sections. The literature review can also identify a gap in the literature to serve as the springboard for the research;
- In qualitative research, researchers position themselves by providing key information as to why they selected the research topic, what they expect to find, and personal information regarding their background relevant to the study. This contributes to the transparency of the research and the narrative style typically employed in the report;
- Terms and concepts used in the research need to be defined, including how they will be operationalized in the study;
- The rationale for the choice of why qualitative research was selected over quantitative or mixed methods. Qualitative research is used when researchers want to capture a detailed understanding of the perspectives of participants regarding the central phenomenon of the research, minimize distance and power differentials between researchers and participants, implement participatory forms of research with goal of meaningful social change, and generate theory or theoretical explanations where few exist;
- Choice of qualitative approach clearly justified as well as sub-approach used. Contemporary qualitative textbooks (Bailey, 2018; Charmaz, 2014; Creswell & Guetterman, 2019; Creswell & Poth, 2018; Glesne, 2016; Lichtman, 2013; Marshall & Rossman, 2016, Merriam & Tisdell, 2016; Mills & Birks, 2014; Richards & Morse, 2013) outline several commonly used major qualitative approaches and sub-approaches.
- Institutional Review Board (IRB) from respective institution(s) discussed as well as ethical considerations that permeate all aspects of the project (see Creswell & Poth, 2018 for a listing of these permeating the various phases of a qualitative project);
- Sample selection procedures made explicit with number and demographic information of participants, how they were recruited, and how sites were selected and accessed. A discussion of how participants will benefit from the research needs to be provided;
- Data collection methods (interview, participant observation, document analysis, etc.) designed, justified, explained, and implemented. Protocols included in report if feasible;
- Data analysis methods discussed in clear detail. How did data analysis proceed? What categories, themes, theory, models emerged? Visual depictions (tables, graphs, figures, diagrams, flow charts) support presentation of findings in a narrative format;
- Validity and reliability or standards of validation/trustworthiness are discussed to contribute to the integrity of the findings (see Babchuk, Guetterman, & Garrett, 2017; Creswell & Miller, 2000, Lincoln & Guba, 1985; Merriam & Tisdell, 2016, and Morse, 2018 for a more detailed discussion of this topic in qualitative research);
- Limitations, delimitations, implications, and suggestions for future research provided;
- Report geared to targeted audience and presented in a narrative format;
- References cited pages and appendices included.

The Collaborative Peer Mentoring Feedback Matrix

In the teaching of qualitative research to introductory and advanced students, we employ a three-step Collaborative Mentoring Feedback Matrix originally developed by one of the co-authors (Babchuk & Wassenmiller, 2012). Following lectures, small group discussions, and exercises practiced throughout the first half of the course, students submit elements of their research design for their semester long projects (Step 1). These include their abstract, type of qualitative research approach they plan to utilize, purpose statement, central research questions and sub-questions, primary data collection procedures, selection of site(s) and participants. These are loaded into the Matrix in black font. In Step 2, the instructor or instructors provide feedback in red font (multiple colors used if more than one instructor). During Step 3, the entire class provides feedback on each research design in green font. Subsequent passes through the Matrix demand different colors of feedback creating a rainbow of input collaboratively designed by students, instructors, and peers. In such a manner, each student’s research design represents a community of feedback more helpful than traditional instructor-feedback models. The students then fine-tune their research designs based on this feedback for their final research project.

The Collaborative Peer Mentoring Feedback Matrix		
Student Name	Abstract	Qualitative Approach/Sub-Approach
Step 1	Student Submission	Student Submission
Step 2	Instructor Feedback	Instructor Feedback
Step 3	Peer (Class) Feedback	Peer (Class) Feedback
	Purpose Statement	Central Research Questions Sub-Questions
Step 1	Student Submission	Student Submission
Step 2	Instructor Feedback	Instructor Feedback
Step 3	Peer (Class) Feedback	Peer (Class) Feedback
	Data Collection Methods	Sample Selection (Sites and Participants)
Step 1	Student Submission	Student Submission
Step 2	Instructor Feedback	Instructor Feedback
Step 3	Peer (Class) Feedback	Peer (Class) Feedback

Implications for the Development of Adult Education Theory and Practice

Qualitative research has become increasingly popular over the past few decades gaining widespread acceptance in practitioner-driven fields such as adult education, education, health care, and social work. This inquiry outlined important components of teaching qualitative research and referenced key sources that cross-cut historical and contemporary work on this topic. A Qualitative Research Design Checklist and Collaborative Peer Mentoring Feedback Matrix were provided. Both the checklist and the matrix have proven to be particularly effective with adult learners who bring a wealth of life experiences to the classroom. Through the matrix, students engage in the co-construction of a myriad of research projects proposed by their peers. By considering the rich and diverse experiences of adult learners, qualitative research will continue to advance our knowledge of research and practice across disciplines and settings.

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