SARAH J. TRACY

QUALITATIVE RESEARCH METHODS

COLLECTING EVIDENCE, CRAFTING ANALYSIS, COMMUNICATING IMPACT

WILEY-BLACKWELL

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About the website

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Instructors

- Powerpoint slides to accompany each chapter
- Sample syllabi for both undergraduate and graduate courses
- A testbank, containing problems for each chapter, including answers
- Lesson plan outlines for each chapter
- 23 additional activities created by guest contributors

Students

- Master list of key terms and definitions
- Worksheets for each chapter
- Exam guides, containing key terms and concepts for each chapter
- List of helpful websites, videos, movies, and blogs

Please visit www.wiley.com/go/tracy to access these materials.

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I dedicate this book to all my past students, research participants, mentors, and colleagues
who have taught me that anything worth doing well is worth doing badly in the beginning.

Preface

Is this book for me?

As I've developed this book on qualitative methodology, I've consistently kept in mind Bud Goodall's (2000) suggestion in *Writing the New Ethnography* that good writing engages the reader as a participative audience. A good read is dialogic and creates space for a conversation. The reader of this book will ultimately be its judge. But, before we begin, I want to share several ways this book and my experience may be of value in your own qualitative journey.

This book takes a "praxis"-centered approach. Stanley Deetz, my advisor at the University of Colorado-Boulder, first turned me on to the idea of problem-centered analyses as a method for doing research that matters (consider Deetz, 2009). Since then, I have written about problem-focused research, and colleagues at Arizona State University have further motivated me to value public scholarship that can improve or transform life for everyday people. Similarly, and as informed by the recent move toward positive scholarship, another poignant starting place comes through examining how positive issues like passion, energy, compassion, or resilience may be constructed and maintained.

This approach has laid the groundwork for my researching a variety of contexts and writing in a range of styles. My home field of speech communication, like many disciplines, is marked by paradigmatic arguments about whether the best and most valid research comes from counting or narrating. Even those who live squarely in the qualitative camp find other issues to debate – definitions of terminology, whether telling stories about ourselves is a valid way to do research, how we should best write or perform our research, and so on.

Some students may not know or care to know about these controversies. However, others view their choice of research

method as a decision laden with political ramifications. The book covers paradigmatic debates. However, in what may be of greater interest and value, my advice comes from the standpoint of someone who has practiced a variety of approaches. I will spend more time focusing on what methods will impact the issue at hand than discussing whether one methodological brand is inherently better than another. Indeed, I think researchers can successfully practice a variety of approaches to qualitative methods. My research includes journal articles in traditional deductive form, but also creative nonfictions and performance scripts for the stage. I have fruitfully worked with colleagues who specialize in autoethnographic performance texts as well as with those who use qualitative methods as a complement to their grant-funded quantitative research.

Good qualitative scholarship is rigorous, interesting, practical, aesthetic, and ethical. Of course, sometimes not all the aims can be equally achieved in the same piece. The aspects of research that should be most highlighted may largely depend on the audience – whether that is a group of scholars, of employees, or of artists. Here I provide a big-tent approach to evaluating qualitative quality, one that can help students strive for high-quality qualitative methods despite their paradigmatic approach. Further, I provide a detailed step-by-step explanation of qualitative data gathering, writing, and analysis.

Indeed, another aim of the book is to fill a gap in terms of data analysis. This book provides a step-by-step explanation of analysis in commonsense terms, understandable both to newcomers and to those well versed in the practice. My focus on data analysis has developed through discussions I have had with a variety of qualitative methods experts over the years – people including Bud Goodall, Robin Clair, Amira DeLaGarza, Carolyn Ellis, Larry Frey, Patricia Geist Martin, Bob Krizek, Bryan Taylor, and Nick Trujillo. We have

discussed a number of joys and challenges associated with teaching qualitative research in the communication discipline. We have also agreed that our students have a wealth of available pedagogical resources on how best to *design* qualitative research, *gather* qualitative data through interviews, focus groups, and fieldnotes, and *write up* the research report. However, as a community, qualitative researchers could better communicate and teach the qualitative data *analysis* process. Indeed students often complain that they need more instruction on what happens *in between* the time they collect the data and the time they write it into a polished research report. In other words, little explicit instruction exists that clearly delineates a variety of systematic data analysis practices.

The book is designed to be accessible to advanced undergraduate students, yet provide enough methodological detail to be helpful to graduate students and advanced scholars. I try to convey methodological information in an easy to understand and engaging manner. People are more attracted to reading something that has a plot line, and they best retain information in the form of narratives. Hence, in the course of discussing the building blocks of qualitative research methods, I share my own joys and frustrations. By sharing these stories – marked as they are by twists and turns, celebrations and disappointments – I aim to make the research process poignant, interesting, real, and occasionally humorous.

This book is appropriate for a variety of disciplines and classes. My examples rely heavily on interdisciplinary communication scholarship, but the qualitative methods described here also apply to students and scholars in numerous other fields, such as management, sociology, psychology, education, social work, justice studies, and ethnic and gender studies. The book is appropriate for college courses that appear under course names such as

research methods, qualitative research methods, ethnography, ethnographic methods, critical research methods, interpretive research, grounded approaches to research, naturalistic inquiry, autoethnography, performance studies, narrative research methods, and field methods. And, although this book is designed primarily for an academic audience, practitioners wishing to engage in qualitative research to solve organizational and societal dilemmas may also find good advice within these pages.

I should note that, although this book presents unique aspects, its format is similar to that of some of the most popular qualitative books on the market. Therefore it should be fairly easy to adopt and transition into. The book is an all-inclusive treatment that leads readers through a qualitative research project from beginning to end. It can be adapted both to one-semester/quarter and to two-semester/quarter classes. Furthermore, although the book includes a story of myself as researcher (and therefore it differs from a “manual”), it need not be read from cover to cover in order to be useful. A summary of the chapters is as follows:

- Chapter 1 introduces qualitative methods, discussing the importance of self-reflexivity and context, introducing the notion of phronetic research, and providing tips for choosing a topic and devising research.
- Chapter 2 overviews qualitative terminology, discusses how qualitative research focuses on action and structure, examines significant historical issues, and concludes with current controversies that situate qualitative methods today.
- Chapter 3 discusses four primary research paradigms and how qualitative research is situated in each – in a way that makes theoretically dense material easy to understand even for those who are new to research methods. The chapter also reviews seven theoretical

approaches that commonly use qualitative data and methodology, namely Geertz's interpretivism, symbolic interactionism, ethnography of communication, sensemaking, participatory action research, feminism, and structuration theory.

- Chapter 4 introduces the concept of field "play" and examines methods for navigating access in order to conduct qualitative research. These include tactics like keeping a contact log, creating an access proposal, organizing a participant table, or considering early investigative methods.
- Chapter 5 provides an explanation of human subjects review, tips for navigating institutional review boards, and a step-by-step guide to writing a research proposal.
- Chapter 6 gives insight on different participant–observer roles, on how to write fieldnotes, on methods for focusing on data collection, and on how to manage various ethical dilemmas in the field.
- Chapter 7 offers the nuts and bolts of planning and designing good interviews, including how to choose the best samples and how to write, structure, and order interview questions and dialogue.
- Chapter 8 focuses on conducting an actual interview or focus group session. It discusses recruitment, developing rapport, ethical engagement, logistics, transcription, and considering advantages and disadvantages of various interview formats – face-to-face, mediated, one-on-one, or group.
- Chapters 9 and 10 detail how researchers can best analyze their interviews, fieldnotes and documents. I provide step-by-step best practices for transforming a heap of data into meaning endowed with theoretical and practical significance. In doing so, I reference tried-and-true grounded analysis methods, but I also introduce new approaches such as discourse tracing. Furthermore, I cover the role of computer-aided data analysis

software. Along the way, I present vignettes and methodology text examples from my own and others' projects to illustrate.

- Chapter 11 offers an overview of qualitative quality – something that is often missing or implicit in other methodology books. In doing so, it reviews traditional measures of research quality and then lays out a multi-paradigmatic approach for ensuring that qualitative research is rigorous, ethical, and credible.
- Chapters 12 and 13 provide detailed information on how to write the qualitative research report. There I talk about various types of qualitative tales, about writing nuts and bolts, about overcoming common errors, and about how to write a lot!
- Chapter 14 comes full circle, overviewing logistical issues for leaving the scene and showing how researchers can frame and deliver their qualitative work so that it impacts the world.

Along the way, I include recurring text boxes. These highlight activities and assignments labeled "Exercise," examples and narratives stored under "Consider this," practical "Tips and tools," and data excerpts or experiences called "Researcher's notepad." Some of these boxes are written in the words of other scholars and students – words in which they talk about their particular experiences. The text boxes provide a break and encourage reader engagement and activity along the way.

Furthermore, I intermittently include sections called "Following, Forgetting, and Improvising." Practicing any interpretive art requires learning the "rules" first, and only then playing with them and improvising. I suggest ways in which researchers might fruitfully improvise with qualitative best practices, or in some cases forget them altogether. Like in all dialectics, the paradox of "following, then forgetting" qualitative best practices is not something that can be

solved or resolved. But, by discussing the tension, we can manage it rather than being trapped by it. There's no easy way out; but there are better ways of navigating than others. I hope this book can serve as a guide.

Finally, an accompanying website with teaching manual materials is available with the book. Materials include:

- sample syllabi for both undergraduate and graduate classes;
- lesson plan outlines of each chapter;
- a list of helpful website links, such as videos, blogs, tutorials, and methodology programs;
- test bank and exam review materials;
- auxiliary exercises and worksheets, some by guest contributors;
- power point slide masters.

These materials will help those who are new to teaching qualitative research methods: they'll be up and running in no time. For experienced instructors, they may serve as a supplement and launching pad for new pedagogical options.

Acknowledgments

Let me close by offering some acknowledgments. I am blessed to have worked with a host of good mentors and colleagues. You'll see me repeat some of their advice verbatim; and, where I do not, remnants and iterations of their wisdom are indelibly stamped upon the guidance offered here. I am indebted to Bryan Taylor, my ethnography instructor at University of Colorado-Boulder and co-author of *Qualitative Communication Research Methods* – his coauthored book on qualitative methods, now in its third edition (Lindlof & Taylor, 2011). Hopefully, the book in your hand can serve as a complement and extension to the pearls of wisdom I first read years ago and have since used in my teaching so many times.

I also am thankful to other mentors at University of Colorado-Boulder. Stanley Deetz offered me invaluable insight on examining the larger structures that liberate and constrain everyday practices and talk. Karen Tracy trained me in close discourse analysis and helped me forge an entrée to my first field project with 911 call-takers. Margaret Eisenhart, in the School of Education, provided a cross--disciplinary examination of ethnography and introduced me to the multiple ways in which cultures can be envisaged, approached, and studied. Bob Craig introduced me to grounded practical theory, and this informs my phronetic problem-based approach to qualitative methodology (Tracy, 2002a). Furthermore, Brenda Allen, George Cheney, Sally Planalp, and Phil Tompkins have served as wonderful friends and life-long mentors.

Colleagues in the Hugh Downs School of Human Communication and throughout Arizona State University have also contributed to the development of this book. Jennifer Scarduzio and Elizabeth Eger have been instrumental in editing, developing teacher manual materials, creating the glossary of terms, and reference checking. Additionally, Shawna Malvini Redden, Kendra Rivera, Lisi Willner, Scott Parr, Desiree Rowe, Karen Stewart, Timothy Huffman, Deborah Way, Amy Pearson, Ragan Fox, Kurt Lindemann, Miriam Sobre-Denton, Amy Way, and Emily Cripe – among many former COM 609 students – have provided excellent input.

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CHAPTER 1

Developing contextual research that matters

Contents

Overview and introduction

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

A phronetic approach: doing qualitative research that matters

Foci of qualitative research

Moving from ideas to sites, settings, and participants

Moving toward a research question

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 analysis 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