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# Southern Taiwan Workshop on Qualitative Methods in the Social Sciences

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Center for Organizational Research  
University of California, Irvine  
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# Part I: *Ways of Knowing*

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# Two Kinds of Research Questions

- What questions

- What factors cause people to vote for one party or another?
- What factors are associated with the adoption of particular technologies?

- How questions

- How do people make the decision to vote for one party or another?
  - How does the practice of adoption affect the meaning of the technology?
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# Two important paradigms

## ■ Positivist

- ❑ Deductive
- ❑ Hypothesis testing
- ❑ Variance models
- ❑ Causal relations
- ❑ What questions

## ■ Interpretive

- ❑ Inductive
- ❑ Meaning-oriented
- ❑ Process models
- ❑ Causal mechanisms
- ❑ How questions

# Either paradigm can be quantitative or qualitative

	Positivist	Interpretive
Quantitative	Common: Use numbers to test hypotheses	Rare: Use numbers to create explanations
Qualitative	Common: Use non-numerical data to test hypotheses	Common: Use non-numerical data to create explanations

# Research Sequences

## ■ Positivist

1. Theorize (formulate question and hypotheses)
2. Gather data (operationalize variables)
3. Analyze data (test hypotheses)
4. Write findings

## ■ Interpretive

1. Gather data (follows some but not extensive theorizing)
2. Analyze data (develop categories)
3. Theorize (establish significance and relevance of categories)
4. Write findings

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# Combining Paradigms

- The paradigm has to fit the question
  - Interaction of two paradigms strengthens both
    - Sequential combining (Lin, 1998)
      - Positivist research can precede interpretive
        - Find statistical correlation, then explore processes and culturally embedded understandings that underlie correlation
      - Interpretive research can precede positivist
        - Find processes/series of understandings that relate one phenomenon with another, then find out how widespread the relationship is
    - Embedded combining (Roth and Mehta, 2002)
      - Positivist analysis informed by contextualized understanding
      - Interpretive data gathering informed by positivist inquiry
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# A Key Qualitative Field Technique

- Participant Observation

- Directly watching a group, context, and/or practice while playing a role in it (roles can vary)
- Associated with ethnography
- Usually extends over long periods of time
- May be used with other qualitative methods: visual, interviewing, collection/interpretation of documents, etc.
- Can be systematically conducted

- Attention to:

- Context and the socially constructed character of meaning and action
- Social process (“how” questions and mechanisms)



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# Why Engage in Participant Observation?

- Enables direct access to people's daily routines
    - Opens up settings, processes, and events that would otherwise be closed
  - Facilitates direct experience
    - Experience “near” vs. experience “distant” research
    - Practical, emotional, and moral knowledge
  - Builds in a longitudinal component
    - Gets at the “how” of social life, which we often miss in so much of social science because we jump to the “why” first
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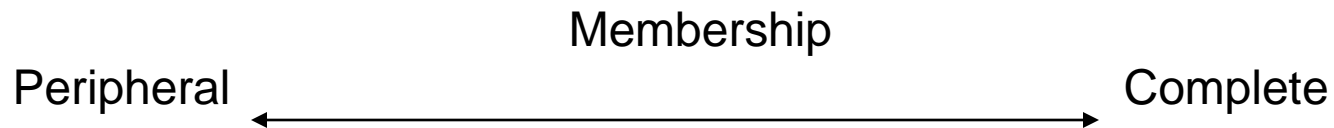
# Challenges of Participant Observation

- Access and Rapport
    - On access, see Morrill et al (1999) and Feldman et al (2003)
    - On rapport, see Snow and Morrill (2005)
  - Strategies for accomplishing it
  - Sampling what you observe
  - Representing what you observe
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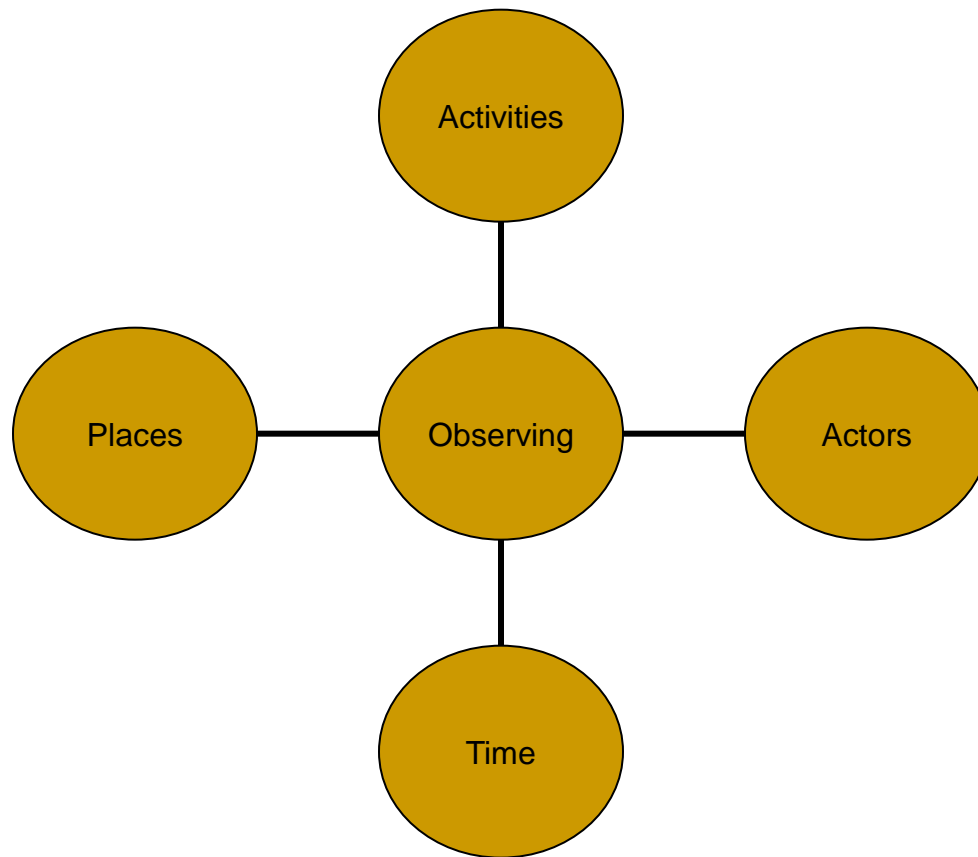
# Strategies of Participant Observation

- Dual role of “participant” and “observer”
  - Suspension of the “natural attitude” (Schutz 1967)
- How you position yourself in the field determines what you can observe
- Structural positioning (Adler and Adler 1987; Snow and Morrill 2005):



- Examples of role identities in the field (Snow et al 1986):
    - “Buddy researcher”
    - “Controlled skeptic”
    - “Credentialed expert”
  - Can use different mixes of positioning and identities in the field depending upon research questions, field conditions, and where you are in your project
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# What Should You Observe in the Field?



Developed by Calvin Morrill and David A. Snow in the Graduate Seminar in Qualitative Field Methods, Department of Sociology, University of Arizona and University of California, Irvine.

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# Sampling Strategies

- Random sampling not as useful for qualitative fieldwork
- Purposive sampling
  - Niche/maximum variation (ecological mapping)
  - Typical cases
  - Extreme or deviant cases
- Opportunistic/convenience sampling
- Snowball Sampling
- Theoretical sampling

# Final Tips on Fieldnotes

- Multiple kinds of fieldnotes
  - Observational notes
  - Analytic/theoretical notes
  - Methodological notes
  - Reminders
  
- Process of recording notes:
  - Mental jottings → written jottings → elaborated fieldnotes
    - Written jottings are phrases, words, fragments of quotes that you write down that will jog your memory and help you elaborate into a full fieldnote later
    - The question of paraphrasing vs. taped communication
    - For each hour in the field, plan at two yours typing the notes later
    - Important to type elaborated fieldnotes as soon as you can once you're out of the field
  
- The importance of organization and retrieval

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## Part II: Observational Exercise: Instructions

- Spend one hour in a public place on or off campus (a restaurant, public square, temple, retail store, train station, etc.) observing the types of people present, what they are doing, the types of social interactions in which they are engaged, the spaces in which their interaction occurs, and how people are giving and receiving service.
  - Use the observational exercise form.
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# Part III: Discussion of Observational Exercise and Visual Ways of Knowing and Interviewing

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# Discussion Questions

- What did you see in your observational exercise?
  - What did you look at? Why?
  - How did you position yourself in the field as observers?
  - How did people respond to you, if at all?
  - What did you find interesting?
  - What did you choose to include in your fieldnotes?
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# Visual Ways of Knowing and Interviewing

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# Materials beyond the “text”

- Traditional focus on “text”
    - But: Talk does not simply “reflect” social reality
  - The “textual turn”
    - Deconstruction, production, author and authority
  - The role of other media?
    - Photographs, video, audio, digital multimedia, designs, artifacts
  - Four “modes”
    - For the researcher
    - With the researcher
    - From the participants
    - For the broader audience
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# For the researcher

- Documentation and scene-setting
    - Prompting the memory
    - Putting you back “in the moment”
    - Documentation for later analysis
  - Analysis proceeds in much the same way
  - But, dangers:
    - Cameras do lie (or at least, mislead)
    - Instruments distance you from the setting
      - In the moment – “oh, I don’t need to watch this carefully, I’ll get it from video”
    - Instruments intervene in your participation
      - For good and for ill
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## With the researcher

- Using materials as part of your interviewing
    - E.g. Photo elicitation in interviews/focus groups
  - Provoking responses
    - A/V materials are concrete
    - A/V materials place people in the scene
    - A/V materials encourage interpretation
      - (which is often your object of study)
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# From the participants

- Having participants themselves generate materials
- Photos, audio recordings, video recordings...
- Literally the “member’s point of view”
  - Access to actions, objects, events, places that you cannot directly see
- Examining the process of selection and framing
  - As always, the central question is, “why specifically *this*”?
  - Focus *not* on material as record
  - Focus *instead* on act of communication

For more on “cultural probes,” see Gaver et al (1999), Boehner et al (2007)



# Participant-Generated Materials: Text + Photograph\*

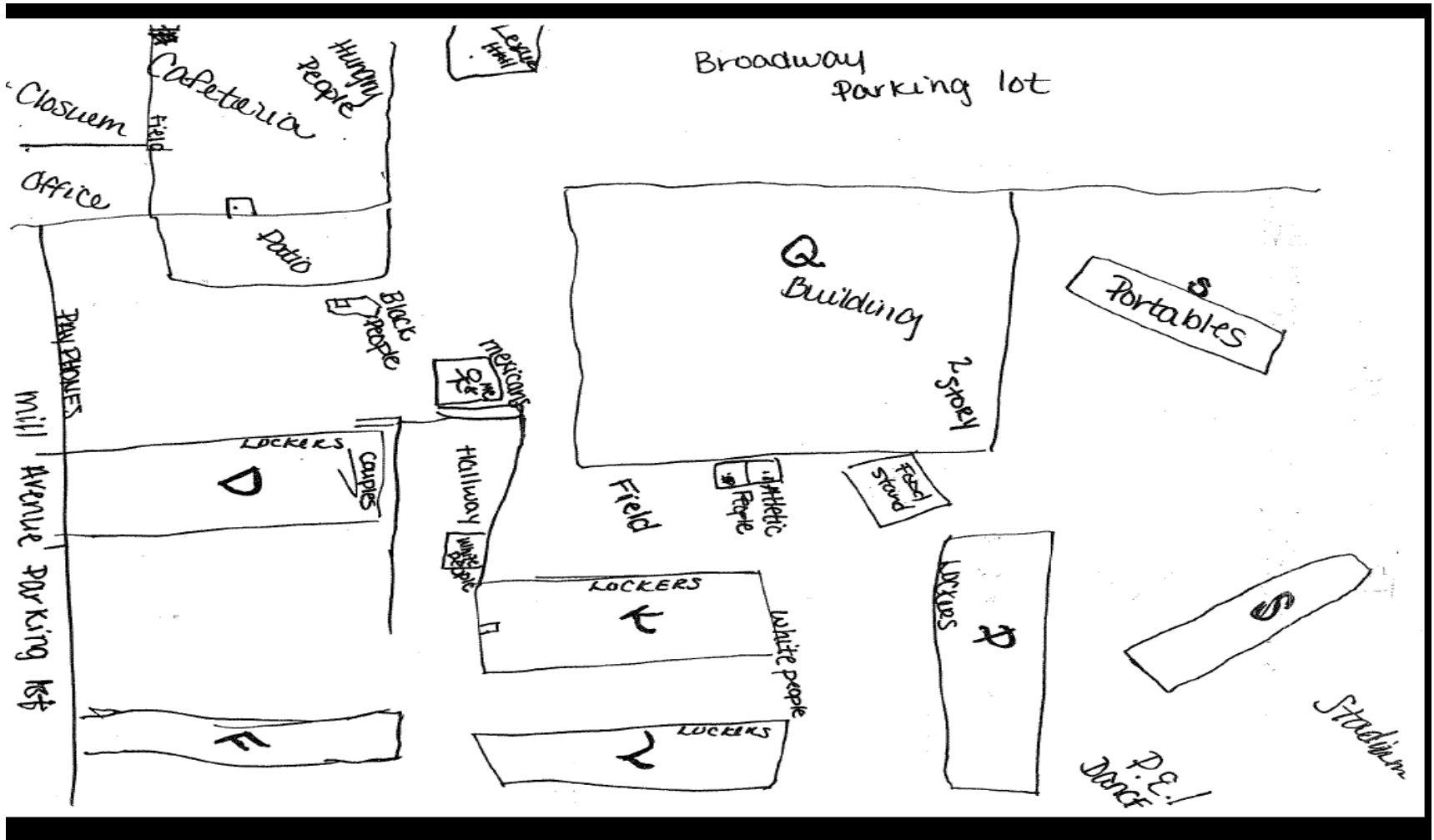
## *“Confined Diversity”*

*When I consider my reasons for taking this picture, many things come to mind. Such things as the difference in shapes, the contrasts of each color thus illustrating the diversity that is our school. As well as the total view and feeling that I get when looking down upon the buckets in the truck just as I was looking down on the hundreds of students that attend our school. Another way I look at this picture is as we the students are the buckets, every one of us is different in shape and color but the same in one small way. The fence in front of us and the building behind us refers to the faculty, staff, and the security guards keeping the students confined to the school premises only allowing particular students off the premises, thus illustrating the new closed campus rule the students have had to conform to this year.*



\*Materials produced by a high school student to represent changes in rules and space at her school.

# Participant-Generated Materials: Drawing



Drawing produced by a student of the physical layout and distribution of social groups on his high school campus.

Source: Morrill and Musheno (forthcoming).



# Participant-Generated Materials: Drawing



Drawing produced by a student of his high school campus.

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# For the Broader Audience

- Alternative forms of presentation
  - Reaching different audiences
    - Including, importantly, the participants themselves!
  - Conveying different messages
  - Integrating different voices
    - Explicit about multiple points of view
    - Bringing them together to compare and contrast
  - Dangers of curation
    - Still implies point of view in juxtaposition, captioning, selection, organization
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# Visual Practice and Visual Culture



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Sources: Pink (2001)

# Visual Practice and Visual Culture



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# Media in Qualitative Research

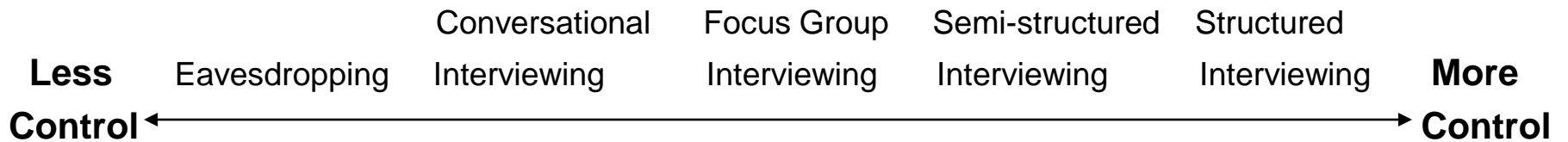
- The role of aesthetics
    - Not just creativity, not just “prettiness”
    - The valuing of experience
    - The emotional, affective fabric of everyday life
  - Ways of communicating
    - “Engaging” in output as well as conduct of research
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# Why Engage in Interviewing?

- To tap into talk as a data source
    - But: Talk does not simply “reflect” social reality
  - To understand how informants make sense of their actions
    - Find out what's important to informants
  - To give voice to informants
    - Important in writing up fieldwork
  - To build rapport with informants
  - To have individuals construct their personal biographies and place them in historical contexts (extends context)
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# Interviewing Control Continuum



- Strategies entail different:
  - Degrees of interviewer *control*
  - Mixes of perspectives “of” vs. “in” action
  - Costs (social and material)
  - Timing within the fieldwork process

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# Designing Semi-Structured Interviews

- Begin by thinking about what will make sense to the informant
  - Structure
    - Best to begin with more descriptive questions and the move to more abstract concerns
    - Fewer questions that cover major themes
  - Kinds of questions
    - Descriptive: who, when, what, where, how
    - Structural: descriptions of groups, activities, organizations
    - Contrast: differences between groups, activities, organizations
  - Tape Recording
    - If you do so, remain engaged by taking notes
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# Conducting Semi-Structured Interviews

- “Active” interview should mimic a good conversation with reasonable “give and take” (Heyl 2001)
- Be flexible with respect to ordering of questions and paying attention to cues from informant
  - Cover themes, but not necessarily in predetermined order
  - Interviewing by comment when appropriate (Snow et al 1982)
- Limit “yes” and “no” questions
- Importance of nonverbal feedback to informant

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# Sampling Informants

- Be conscious of the information yield from different types of informants (Snow et al 1986):
    - Veteran
    - Neophyte/rookie/novice
    - “True believer”
    - “Heretic”
  - Functions of different informants
    - Surrogate census taker
    - Observer’s observer
    - Typical perspective
    - Atypical perspective
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# Part IV: Analysis and Outputs

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# Role of Analysis

- Two processes of analysis
  - Doubt generation (finding interesting questions)
  - Uncertainty resolution (developing answers)
- Both processes important for positivist and interpretive research
- Processes take place at different stages of positivist and interpretive research

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# Positivist Analysis

- Doubt generation takes place in the analysis of previous studies and the development of hypotheses
  - Uncertainty resolution takes place after data gathering
    - Hypothesis testing
    - Focus on similarity/ centrality
    - Control for context
    - Data reduction through category creation
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# Interpretive Analysis

- Doubt Generation takes place after data are gathered
    - Disrupt order of data
    - Develop hunches through coding and memoing
    - Expand connections within data through heuristics and meta-theories
  - Uncertainty resolution takes place at later stages of analysis
    - Develop holistic, contextual explanations
    - Support explanations through “triangulation”
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# Analysis Techniques

- **Coding** (Corbin and Strauss, 2008; Emerson, Fretz and Shaw, 1995; Spradley, 1979)
    - Activities, actors, places, times
    - Meanings (e.g., all the ways of talking about...)
  - **Memoing** (Corbin and Strauss, 2008; Emerson, Fretz and Shaw, 1995)
    - Discussion of ideas generated through coding
  - **Thought experiments** (Abbott, 2004; Feldman, 1995)
    - Heuristics (e.g., lists, reversals)
    - Meta-theories (e.g., semiotics, ethnomethodology, dramaturgy, deconstruction)
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# Importance of Writing in Analysis and Producing Outputs

- Multiple moments of writing in qualitative fieldwork:
    - Field jottings → fieldnotes ↔ data analysis ↔ analytic memos ↔ write-ups
    - Fieldworkers “write” back and forth across fieldwork, fieldnotes, data analyses, memos, and write-ups
    - There are intensive, recursive relationships between the later four stages that involve interpretation and translation, and in effect, figuring out the story and “theorized storyline” (Golden-Biddle and Locke 2007)
  
  - Some pragmatic things to remember:
    - Importance of fieldnote excerpts and informant voices
    - Importance of “seeing” the argument in the data: how do you know?
    - Importance of being able to recount how you constructed your interpretations
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