Qualitative Studies in Special Education

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Abstract

We provide an overview of the many types of studies that fall into the qualitative design genre. We also list and define strategies that qualitative researchers use to establish our studies as credible and trustworthy. So that readers will recognize the important contribution that qualitative studies have made in the field of special education, we review a range of well-known and lesser known examples of qualitative research. We identify the quality indicators that are important in conducting and/or evaluating qualitative research. Finally, as an example of the evidence that can be produced using qualitative methods, we provide a summary of how three studies have provided important information that can be used to inform policy and practice.
Qualitative Studies in Special Education

Qualitative research in the social sciences has risen to prominence in recent years. Although there may be an impression that qualitative research is new to special education, its history can be traced back almost two centuries. Certainly, at present, the qualitative studies genre is broad, complex, and growing, hence settling on one definition is difficult. A definition that we believe is flexible enough to be inclusive is that qualitative research is a systematic approach to understanding qualities, or the essential nature, of a phenomenon within a particular context. We start this paper with the assertion that qualitative designs do produce science-based evidence that can inform policy and practice in special education. We further claim that, similar to the other research genres covered in this special issue of Exceptional Children, qualitative research involves:

* Empiricism - knowledge derived from sense experience and/or careful observation;* Knowledge production - about perspectives, settings, and techniques;* Particular research skills and tools - systematic use of certain qualitative methods;* Production of scientific evidence - valid information about the physical, material, and social worlds; and* Coherent articulation of results - papers presenting qualitative studies establish the purpose and usefulness of findings as well as their implications for the field.

In this paper, after clarifying the goals and nature of qualitative research, we support the above claims by providing an overview of some prominent studies that have contributed to understanding people with disabilities and/or characteristics of services developed to meet their needs. We then delineate techniques that can be used to ensure that qualitative research is
credible. We then present quality indicators that qualitative researchers need to address to make sure our work meets high scholarly standards. Finally, we include an overview of the ways three recent qualitative studies do provide evidence that can be used to inform policy and practice.

Goals of Qualitative Scholarship

Qualitative research can be done for a multitude of purposes, however, these might be condensed to fit under the National Research Council’s categories of producing descriptive or procedural knowledge; that is, answering questions about “what is happening?” and “why or how it is happening?” (Shavelson & Towne, 2002, p. 99). Descriptive information from qualitative studies leads to an understanding of individuals with disabilities, their families, and those who work with them. Qualitative studies explore attitudes, opinions, and beliefs of a number of parties involved in special education as well as the general public, and examine personal reactions to special education contexts and teaching strategies. Descriptions about settings conducive to productive learning outcomes or life circumstances also are of value. Qualitative designs can trace and document certain teaching and learning effects. They can explore the nature and extent to which a practice has a constructive impact on individuals with disabilities, their families, or on settings where they tend to work, reside, or be educated.

The Nature of Qualitative Research

Qualitative research is an umbrella category that encompasses various kinds of studies. The terms used by qualitative researchers often depend on our fields or which “how to” books guide our studies. It might be noted that confusion about qualitative work is partly due to the fact that qualitative approaches developed somewhat simultaneously in separate fields (e.g., symbolic interaction in psychology, phenomenology in philosophy, discourse analysis and interpretive work in cultural studies, conversation analysis in sociology and sociolinguistics, ethnography in
As the boundaries between disciplines blur, we have come to realize that distinctive terms have similar meanings. Qualitative, naturalistic, interpretive, field or case study, inductive research, and ethnography often are used interchangeably or to refer to the same methods (Merriam, 1998). Inquiry, research, method, design, and study also are basically synonymous. We list a number of types of qualitative studies in Table 1.

A common claim is that qualitative research is inductive (process of reasoning from specific to general) in that certain contexts or small numbers of individuals are studied before theories (explanations, hypotheses) are developed. However, qualitative research also can be deductive (process of reasoning from general to specific). For example, we might have a hunch about a phenomenon based on personal experience and examine representative cases to document what was conjectured to illustrate the nature of what is happening for readers. Indeed, it seems the more experienced the researchers, the more their studies would anticipate findings and be designed to document rather than discover phenomena.

Qualitative researchers often bill ourselves as “the instrument” in our research enterprise. We come up with ideas to study and develop research questions. We clarify our theoretical or conceptual framework. We decide on the designs and techniques to address our research questions and problem conceptualization. We typically collect our own data by observing in the field and/or interviewing participants. We find relevant documents to examine. We sort through data, reading transcripts and fieldnotes, to make sense of information collected. Finally, we “tell the story” of our research enterprise; we write the report for dissemination. We must frame reports so journal editors will accept our work or press publishers see the value of turning our manuscripts into books. We must develop the writing skills and imagination to tell our stories in
an engaging way that interests and informs readers. In doing these things, we truly are the instrument. To do qualitative work well (be valid instruments), we must have experience related to our research focus, be well-read, knowledgeable, analytical, reflective, and introspective.

Because as qualitative researchers we are constantly evolving instruments and because settings and people also are dynamic and diverse, data collection is most productively done in creative ways. This might involve using a tentative interview protocol in a flexible way (rather than using a rigidly structured protocol in the same way with all “subjects”) so that questions might be modified or added to as preliminary evidence emerges. The course--even purpose--of studies may change midstream if we come across interesting circumstances or if theories that arise in the initial round of the investigation merit taking a sidetrack from the original plans. There is considerable leeway in how we gather and report information. In proposing research, we may not be able to be specific about how many participants ultimately will be involved in a study. We use the term saturation to indicate that if recent interviews discern the same information given by earlier respondents, there is no need to interview more people. We use the same logic for discontinuing observations and/or document analysis. There is not a one-size-fits-all way to proceed in collecting information for a study. For example, some qualitative researchers use a retrospective recall of past experience as the basis for their studies rather than deliberately collecting new data (e.g., Angrosino, 1998). Others use inventive report styles (Glesne, 1999; MacNeil, 2000; P. Smith, 2001).

Perhaps the most controversy among qualitative researchers relates to opinions about objectivity and subjectivity. The belief that subjectivity cannot be completely controlled is held by many. Some of us celebrate the fact that we are studying phenomena through a particular positional lens (e.g., postmodern, feminist, critical race theory, queer theory, disability studies)
or that our scholarly gaze is enhanced by our moral grounding (Brantlinger, 1997; 1999). In contrast, qualitative researchers on the more positivist end of a qualitative to quantitative continuum see subjectivity as a problem that interferes with research validity. They may attempt to bracket their subjectivity by taking inventory of, and attempting to control, assumptions and biases when collecting and analyzing data. However, rather than believing it possible to be neutral, distant, and objective, most qualitative researchers recommend being explicit about personal positions, perspectives, and value orientations (see Harry, 1996; Peshkin, 1988).

Contributions of Existing Qualitative Studies

In this section we review important contributions made by early and current qualitative researchers. We illustrate the range of studies by highlighting examples of qualitative methods used in them. As we noted in our introduction, qualitative research already has had an important impact on special education and disability studies. Perhaps the earliest contribution was the careful observations described by French physician Itard in his classic case study, *The Wild Boy of Aveyron* (1806/1962). Victor, the “wild boy,” was found in the woods and presumed to be either severely environmentally deprived or abandoned by his family perhaps because of his developmental delays. Itard’s experiments with interventions he hoped would be effective in educating and “civilizing” Victor might be seen as action research, a form of qualitative research. Another early example of a qualitative case study with action research elements is Anne Sullivan Macy’s groundbreaking work with Helen Keller (Keller, 1955). The overlap of both studies with single subject design might be noted in that the researcher/practitioner systematically experiments with various types of interventions while carefully recording the response of their students to each approach.

Another seminal qualitative study was conducted by anthropologist, Robert Edgerton
In order to understand insiders feelings about segregation and sterilization, Edgerton interviewed 48 adults classified as retarded who had spent much of their lives in institutions. The injustice and pain revealed in his *Cloak of Competence: Stigma in the Lives of the Mentally Retarded* inspired advocates to exert pressure on legislators and court officials to overturn the involuntary sterilization laws enacted in many states earlier in the century. The *visual rhetoric* of pictures taken at institutions in *Christmas in Purgatory: A Photographic Essay in Mental Retardation* (Blatt & Kaplan, 1966) provided poignant evidence of inhumane conditions experienced by people with disabilities who lived in large state hospitals. Collecting and interpreting pictorial data is considered an *observational* technique in qualitative work (Harper, 2000). These publications aroused widespread indignation, thus provided the impetus to arrange community alternatives for people with disabilities that was part of the deinstitutionalization movement. In England, Mattinson’s (1971) *interviews* with, and *observations* of, people released from institutions revealed that couples who lived together and shared their strengths were able to survive independently. These findings showed that laws against marriage for people with cognitive disabilities were not logical, cost effective, or ethical.

The idea that power imbalances existing between professionals and poor families result in minority and low-income children being classified as disabled and/or placed in separated schools or classrooms at a greater rate than white, middle class children was brought to attention by Mercer’s (1973) *Labeling the Mentally Retarded*. Mercer found that African American children, who performed competently in their homes and neighborhoods, still had IQ scores low enough to be labeled and treated as mentally retarded. Her ideas about the “6-hour a day retarded child” (i.e., identified as disabled only through school tasks and psychological and academic achievement tests) challenged the general faith in the validity and fairness of IQ tests. Mercer’s
work provided the rationale for requiring an adaptive behavior measure for classification as mentally retarded. This was among the studies that caused advocates to think about damaging aspects of the medical model, which posits disability as a permanent, innate flaw in certain identified children rather than a social construction that depends on context and the nature of school and societal practices.

An ethnography, *The Forgotten Ones: A Sociological Study of Anglo and Chicano Retardates* (Henschel, 1972), demonstrated that school personnel’s assumptions about ethnicity influenced their referral, testing, and placement procedures. Rosenthal and Jacobson’s (1968), *Pygmalion in The Classroom: Teacher Expectation and Pupils’ Intellectual Development* combined qualitative (*interviews, observations, document analysis*) and quantitative methods (e.g., random sample, experimental design) to discern that expectancies of teachers and students influenced Latino children’s school achievement and educational outcomes. These qualitative studies focused on the phenomenon of over-representation, which continues to be addressed by scholars concerned about equity and a “do no harm” philosophy related to professional practice (Connor & Boskin, 2001; Harry, Klingner, Sturges, & Moore, 2002).

Personal narratives and life histories are prominent forms of qualitative work that explore the lived experiences of people with disabilities (Bogdan & Taylor, 1976,1994; Heshusius, 1981; Kliwer, 1998; Kliwer & Biklen, 2001). An assumption of narrative research is that people are story-tellers, who lead storied lives. Representing various disciplines, people with disabilities have written *memoirs, autobiographies, and autoethnographies* (Asch & Fine, 1988; Charlton, 1998; Clare, 1999; Duplass & Smith, 1995; Gabel, 2001; Gerschick, 1998; Grandin & Scariano, 1986; Hahn, 1983, 1997; Linton, 1998; Oliver, 1990; Peters, 2000; Ronai, 1997; Rousso, 1986; Thomson, 1997). Family members (e.g., Davis, 1995; Dorris, 1989; Featherstone, 1980;
Ferguson & Ferguson, 1986; Kittay, 1999; Turnbull & Turnbull, 1979) have written biographically about loved ones or autobiographically, telling their versions of special education and/or living with someone with disabilities. These personalized accounts provide insight into how classification and treatment are perceived by people with disabilities and their families. Qualitative studies typically include an emic (insider to phenomenon) in contrast to quantitative studies’ etic (outsider) perspective. By focusing on participants’ personal meanings, qualitative research “gives voice” to people who have been historically silenced or marginalized.

*Interpretation* is a necessary stage of all qualitative work. It typically follows, is infused with, or occurs simultaneously with the description of findings and analyses of results. As a subset of the qualitative genre, some refer to studies as interpretive when they contain a critical element that entails intense interrogation of the meanings that undergird daily life occurrences, commonsense assumptions, trends in the field, power imbalances in institutional structures, and values in social life. A flourishing scholarship done primarily by sociologists and anthropologists relies on the qualitative tools of *deconstruction* (scrutinizing text closely for tacit meanings), and *reflexive* (thinking deeply about personal and professional assumptions) and *critical analyses* (looking for power disparities among actors) of discourses to make sense of disability’s place in social life. Among early studies are Goffman’s *Asylum* (1961) and *Stigma* (1963) and Foucault’s *Madness and Civilization* (1965) and *The Birth of The Clinic* (1975). These reports and other analyses of normative practice reveal how disability and professional practice are culturally constructed (Bogdan, 1988; McDermott & Varenne, 1995; Mehan, 1979, 1991; Mehan, Hertwerk, & Meihls, 1986; Richardson, 1999; Sacks, 1989, 1995; Varenne & McDermott, 1999). Seminal work by special educators Skrtic (1991) and Tomlinson (1982) provide insight into the tensions related to labeling and placement practices (see also Coles, 1987; Danforth & Navarro,
1998, 2001; Ervelles, 2000; Grant & Sleeter, 1986; Linneman, 2001; Richardson, Casanova, Placier, & Guilfoyle, 1989; Rogers & Swadener, 2001; Sleeter, 1986; T. J. Smith, 1997; P. Smith, 1999a, b; Taylor, 1988). Qualitative studies by special education scholars often draw from the voices of recipients of special education services (e.g., Allan, 1999; Brantlinger, 1986, 1994; Groce, 1985;1996; Harry, Day & Quist, 1998; Rao, 2000; Zetlin & Hosseini, 1989). Others document school and classroom practice (Bos & Richardson, 1993; Cambone, 1993; Fierros & Conroy, 2002; Jimenez, & Gersten, 1999; Kalanpur & Harry, 1999; Lee, 1999; Meyer, Park, Grenot-Scheyer, Schwartz, & Harry, 1998). These studies remind us to question what we think we know and who we think we are as professionals and open space for discussion with recipients of special education services about the characteristics of the good life in a pluralistic, democratic society (Harry, Klingner, Sturges, & Moore, 2002; Pugach, 2001)

**Discourse analysis** (see Table 1) is an innovative qualitative research approach that does not necessarily rely on the traditional collection of data but rather analyzes existing texts and discourses evident in everyday life. Studies might focus on news or entertainment media portrayals of individuals with disabilities or on assumptions embedded in policies, laws, and regulations. Based on *discourse analysis* of the assumptions and values embedded in certain disability-related practices and policies (and *content analysis* of laws and written policies), Wolfensberger (1972) developed a well-known set of normalization principles. He convinced professionals and politicians that basing specialized laws and treatment solely on disability classification violated individuals’ civil and human rights. These principles laid the groundwork for least restrictive and equal access clauses in local, state, and federal laws. Although often criticized as too theoretical, hence impractical, such interpretive studies are essential to understanding potentially damaging practices for people with disabilities. Although some might
question whether they generate scientific evidence that informs practice and policy, we think that if the nature and impact of Wolfensberger’s normalization principles and Goffman’s evidence about stigma are examined, these qualitative techniques will be judged useful and necessary.

*Establishing the Credibility or Trustworthiness of Empirical Qualitative Research*

Quantitative research reports must include information about validity and reliability. Although less applicable to interpretive types of research, qualitative researchers also have the task of ensuring that their *empirical* qualitative studies (involve actual collection of data in the field) are *credible* and *trustworthy*. Strategies employed to ensure that qualitative studies are sound are listed in Table 2. These practices are commonly used to indicate that audiences can trust the research, however, we caution against using credibility measures as a checklist in a rigid or unreflective way. Some studies are done in original ways that make the use of such measures difficult or irrelevant. Others explore people’s biased views and/or discriminatory institutional practices. In such cases, member checks, for example, would not be feasible because participants would not tolerate reading about their prejudices and unseemly actions. Although we encourage researchers to use credibility techniques to demonstrate their studies are sound, we also believe that authors who succinctly clarify the methods used and the rationale for them can convey that their reports are reliable and worthy of attention without alluding to the credibility measures.

*Quality Indicators for Qualitative Studies*

Quality indicators are distinct from, and perhaps more important than, standard credibility measures. In this section we suggest guidelines that can be used to plan qualitative research that meets high standards. We provide quality indicators for the three common data collection methods in qualitative studies: observations of settings, interviews with individuals or groups, and analyses of documents as well as for the analytic procedures shared by these three
strands in Table 3. Quality indicator guidelines should always relate to the research questions and conceptual frameworks of particular studies. Basically, they call for transparency, or clear descriptions, of methods used (Harry, Sturges, & Klingner, in press). Because some qualitative studies use unique designs or unconventional report formats, it is wise to be reasonable and not apply the quality indicators in an arbitrary or intolerant manner (Wolcott, 1990).

*Qualitative Research Evidence for Policy and Practice*

So far in this paper we have argued that qualitative research contributes to the fields of special education and disability studies by capturing involved people’s perspectives and by adding to our understanding of discourses that shape social life in schools and society. Some overviews of research genres in this series may be able to designate a specific level of confidence in results or a prescribed number of studies to indicate that sufficient evidence exists to recommend a practice. From the qualitative perspective such an undertaking is not logical. It is antithetical to the epistemological and ontological philosophies that ground qualitative scholarship to make authoritative pronouncements about what works for every person with disabilities in every social context. Most qualitative researchers eschew agendas that are based on acquiring foundational knowledge or unmalleable prescriptions for practice. Just as we emphasized that the qualitative researcher must be an informed and experienced research instrument, we also recommend that reviewers or consumers of research reports use logic and reason in evaluating whether sufficient evidence was accrued to understand a perspective, determine a policy, or use a practice. Nevertheless, at the beginning of this article, we asserted that qualitative work can be empirical and can produce knowledge if research tools are used in a systematic and informed manner. That is, we claim that qualitative studies can produce scientifically sound evidence that informs policy and practice.
Qualitative research is not done for purposes of generalization but rather to produce evidence based on the exploration of specific contexts and particular individuals. It is expected that readers will see similarities to their situations and judge the relevance of the information produced to their own circumstances. Because we make no claims that we can create universal and essential knowledge for policy or offer universal prescriptions for practice, we instead describe research projects to show how their results can inform policy makers and practitioners.

The first article/study we review is by Harry, Day, and Quist (1998). Part of a multi-year study of a number ethnically diverse families who have a child with a disability, this particular article focused on an adolescent with Down syndrome, whose family recently immigrated from the Dominican Republic. The researchers followed the youth and three of his brothers to a number of everyday community recreational and school settings. They interviewed the boys and their parents. The authors told a simple but poignant and informative story about a remarkable family. They wove evidence of cultural style into their report so that readers can see how these might contrast rather constructively with some of the cultural practices found in typical American schools. The article included multiple vignettes of field notes observations and quotations from the brothers’ conversational exchanges as well as responses to interview questions. These provide clear evidence of the bonds between the boys and the constructive nature of their interdependent relations. Quotations from the parents illustrate the characteristics and importance of parental authority regarding expectations for their sons. The report of the brothers’ supportive interaction and brave advocacy offer an excellent model of acceptance of difference, helpful support, and joy in the relations of family members. The authors contend that these particular family values and relations can transfer into school settings providing a valuable model for teachers and peers. The evidence provided in the article related to how peer relations
might be developed in inclusive settings is informative and authors’ arguments are compelling.

A second qualitative study that involves multiple observations and interviews to produce rich evidence of constructive school practice was by conducted by Jimenez and Gersten (1999). Again, like the Harry et al. study, this was a funded project which included research assistants collecting data at a number school sites that employed Chicano/a teachers and enrolled Chicano/a students. The article included detailed information about the instructional practice of two teachers including evidence that their teaching styles were quite different from each other. They also found that students responded distinctively to the teachers in each classroom. The authors drew from the evidence of these teachers (and numerous others studied) to form a list of nine ideas for effective instruction of Chicano/a students. Again, like Harry and her colleagues, Jimenez and Gersten detailed the cultural attributes of the Mexican-American teachers and how they created culturally relevant curriculum in their classrooms. The report richly illustrated the nine effective practices clearly enough for readers not only to understand but also to imitate in their own teaching practice. Perhaps most interesting to those of us who suspect that no one method always works in all situations, especially given the diversity of children classified as disabled, is that the authors were able to identify distinctive, and quite effective, instructional styles. The authors impressively detailed the complexity of classroom contexts, the differences in children’s responses to teachers’ pedagogy, and various nuances in their teacher participants’ ways of working with children.

A third qualitative study that merits inclusion because it generated evidence of effective instructional practices is the case study of a 27 year veteran first grade teacher conducted by Pressley (2001). Based on extensive classroom observation, Pressley’s “enduring image of Barb’s classroom” was “children engaging productively in reading, writing, and problem
Pressley summarized a number of effective methods, including the encouragement of self-regulated learning in students and fluid networking among children who were supportive of each others work. Barb frequently praised students (“the air in her classroom was filled with quiet reinforcement”), but also pushed them to challenge themselves (p. 98). A “great deal of reading by both students and the teacher” went on in Barb’s class (p. 98). Barb introduced students to classic literature and poetry that they would find “intriguing.” She had children read books that they had selected from the library in her classroom and then take them home to read to their parents. Every day students wrote in their journals, and Barb integrated writing with subjects like math. She offered explicit teaching of writing. For example, she taught students how to construct a summary by sharing some good summaries with them while remarking on the ways these summaries were good. She had students self-evaluate their grammar, punctuation, and spelling in their writing and make tentative corrections before having someone else (peer, aide, or teacher) review their work. She published students’ stories by word-processing them. Pressley observed no “decontextualized teaching of skills,” but there were indications that “skills coverage was systematic” (p. 103). Barb reminded students to sound words out, look for little words in big words, use picture and context clues, and ask someone else for assistance in oral reading. She provided basic scaffolding in an “opportunistic” way by monitoring closely and giving hints so students could get the satisfaction of figuring something out on their own (p. 105).

These three examples of qualitative studies in and out of school provide a balance of synthesized descriptions of teaching or social interaction and informative vignettes based on field notes or quotations gleaned from formal interviews or overheard conversations. The reports of these three studies were highly readable and engaging. Because of the thick and detailed
descriptions of events, the information covered in the two articles and the chapter would be likely to translate easily into the readers’ classroom practices. Policy makers who are responsible for inclusion of students with disabilities, bilingual education, and first grade literacy instruction would come away with a good sense of what is important in classrooms. In other words, the evidence presented in these studies transfers readily to policy and practice.

In providing this brief overview of the complex genre of qualitative research, we have tried to make the case that qualitative research has contributed to the fields of special education and disabilities and will continue to have an impact. Without being overly rigid and prescriptive, we have listed a the range of qualitative studies and have outlined ways that studies can be conducted so that they are credible and trustworthy. We have detailed the quality indicators that might be used to develop, conduct, and evaluate qualitative work. We want to join with the authors of the other articles in this special issue to assert that various research designs are needed to answer various research questions. As qualitative researchers, we believe our own qualitative studies as well as those of our special education colleagues should be validated as providing necessary evidence for practice and policy development.
References


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Table 1: Types and Descriptions of Qualitative Research

**Case study** - exploration of a bounded system (group, individual, setting, event, phenomenon, process); can include autobiography and biography.

**Collective case study** - a study that takes place in multiple sites or includes personalized stories of several similar (or distinctive) individuals.

**Ethnography** - description/interpretation of a cultural or social group or system; typically includes observations, interviews, and document analysis.

**Action research** - researcher brings ideas for practice to fieldwork so as to have an impact on the setting/participants while collecting data.

**Collaborative action research** - researcher and practitioner share ideas about how to change practice and work together to modify a situation as well as collect information for a study.

**Grounded theory** - research done to generate or discover a general theory or abstract analytical hunch based on study of phenomena in a particular situation(s).

**Phenomenology** - studies the meanings people make of their lived experiences.

**Symbolic interactionism** - studies interpretive processes used by persons dealing with things and social situations.

**Narrative research** - collection of personal narratives; based on recognition that people are story-tellers who lead storied lives.

**Life (oral) history** - extensive interviews with individuals to collect first person narratives about their lives or events in which they participated.

**Qasi life history research** - encouraging participants to recall and reflect on earlier as well as current meaningful occurrences in their lives.
**Interpretive research** - used synonymously with “‘qualitative work’” and/or to refer to research framed within certain (critical, feminist, disability study, critical race) theories.

**Content analysis** - close inspection of text(s) to understand themes or perspectives (also refers to the analysis stage of qualitative studies).

**Conversational analysis** - studying interactional situations, structure of talk, and communicative exchanges; includes recording facial expressions, gestures, speed or hesitancy of speech, and tone of voice.

**Discourse analysis** - deconstructs commonsense textual meanings; identifies meanings that undergird normative ways of conceptualizing and discussing phenomena.

**Ideological critique** - discourse analysis that assumes political meanings (power disparities) or ideologies are embedded in, and infused through, all discourses, institutions, and social practices.
### Table 2: Credibility Measures for Qualitative Research

**triangulation** - search for convergence of, or consistency among, evidence from multiple and varied data sources (observations/interviews; one participant & another; interviews/documents).

- **data triangulation** - use of varied data sources in a study.
- **investigator triangulation** - use of several researchers, evaluators, peer debriefers.
- **theory triangulation** - use of multiple perspectives to interpret a single set of data.
- **methodological triangulation** - use of multiple methods to study a single problem.

**disconfirming evidence** - after establishing preliminary themes/categories, the researcher looks for evidence inconsistent with these themes (outliers); also known as negative or discrepant case analysis.

**researcher reflexivity** - researchers attempt to understand and self-disclose their assumptions, beliefs, values, and biases (i.e., being forthright about position/perspective).

**member checks** - having participants review and confirm the accuracy (or inaccuracy) of interview transcriptions or observational field notes.

- **first level** - taking transcriptions to participants prior to analyses and interpretations of results.
- **second level** - taking analyses and interpretations of data to participants (prior to publication) for validation of (or support for) researchers’ conclusions.

**collaborative work** - involving multiple researchers in designing a study or concurring about conclusions to ensure that analyses and interpretations are not idiosyncratic and/or biased; could involve inter-rater reliability checks on the nature of observations made or the coding of data.

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1 The notion that persons working together will get reliable results is dependent on the
**external auditors** - using outsiders (to the research) to examine if, and confirm that, a researchers’ inferences are logical and grounded in findings.

**peer debriefing** - having a colleague or someone familiar with phenomena being studied review and provide critical feedback on descriptions, analyses, and interpretations or a study’s results.

**audit trail** - keeping track of interviews conducted and/or specific times and dates spent observing as well as who was observed on each occasion; used to document and substantiate that sufficient time was spent in the field to claim dependable and confirmable results.

**prolonged field engagement** - repeated, substantive observations; multiple, in-depth interviews; inspection of a range of relevant documents; done to claim that “‘thick data’” (see Geertz, 1973) or thick description validates the soundness of the study.

**thick, detailed description** - reporting sufficient quotes and field note descriptions to provide evidence for researchers’ interpretations and conclusions.

**particularizability** - documenting cases with thick description so that readers can determine the degree of transferability to their own situations.

“truth claim” assumption that one can get accurate descriptions of situational realities.
Table 3 Quality Indicators within Qualitative Research

For Interview Studies (or Interview Components of Comprehensive Studies)

* Appropriate participants are selected (purposefully identified, effectively recruited, adequate number, representative of population of interest).

* Interview questions are reasonable (clearly worded, not leading, appropriate and sufficient for exploring domains of interest).

* Adequate mechanisms are used to record and transcribe interviews.

* Participants are represented sensitively and fairly in the report.

* Sound measures are used to ensure confidentiality.

For Observation Studies (or Observation Components of Comprehensive Studies)

* Appropriate setting(s) and/or people are selected for observation.

* Sufficient time is spent in the field (number and duration of observations, study time span).

* Researcher fits into the site (accepted, respected, unobtrusive).

* Research has minimal impact on setting (except for action research which is purposely designed to have an impact).

* Field notes systematically collected (videotaped, audiotaped, written during or soon after observations).

* Sound measures are used to ensure confidentiality of participants and settings.

For Document Analysis

* Meaningful documents (texts, artifacts, objects, pictures) are found and their relevance
is established.

* Documents are obtained and stored in a careful manner.
* Documents are sufficiently described and cited.
* Sound measures are used to ensure confidentiality of private documents.

**For Data Analysis**

* Results are sorted and coded in a systematic and meaningful way.
* Sufficient rationale is provided for what was (or was not) included in the report.
* Documentation of methods used to establish trustworthiness and credibility are clear.
* Reflection about researchers’ personal position/perspectives are provided.
  * Conclusions are substantiated by sufficient quotations from participants, field notes of observations, and evidence of documentation inspection.
* Connections are made with related research.