

Choosing the Right Qualitative Approach(es)

Qualitative research represents different things to different people. This chapter is devoted to six of the most commonly used methodological approaches: ethnography, grounded theory, case studies, narrative, phenomenological, and action-oriented research. Because there are detailed how-to books on each of these, this overview is designed primarily to assist in deciding which approach to use—the reader is urged to read further once an approach is selected (a list of additional readings is provided at the end of this chapter). Singling out each approach for in-depth description belies the fact that qualitative researchers frequently mix and match approaches within the confines of a single study (a topic covered later in this chapter).

Six Primary Approaches in Qualitative Research

Ethnography

Ethnographic research, the most senior of the “elders” in the qualitative family, has been enshrined as a method, a theoretical orientation, and a philosophical paradigm (Tedlock, 2000). Although its popularity has ebbed and flowed over the years, ethnography has maintained its central position as the quintessential qualitative method. Its reliance on direct observation and *emic* (or insider) perspectives sets a high standard for commitment that

stands in contrast to the *etic* (or outsider) perspective assumed by many researchers (Goetz & LeCompte, 1984).

In addition to requiring skills in gaining rapport and engaging in intense and ongoing observation, ethnography implies an attitude or stance. Specifically, it means that one adopts a *holistic perspective*, viewing all aspects of the phenomenon under study as parts of an interrelated whole. Ethnography also embraces *cultural relativism*, a perspective holding that cultures must be understood on their own terms, not judged by the beliefs and values of other, more powerful cultures. Although intolerable if taken to the extreme (e.g., considering the genocide in Rwanda to be a manifestation of tribal enmities that should not be judged by outsiders), cultural relativism has value as a challenge to *ethnocentrism*, or the denigration of cultures other than one's own. Despite the trademark approach of participant observation, anthropologists have for a long time incorporated measures and statistical analyses in their work (e.g., changes in caloric intake or group differences in social networks).

Doing ethnography means focusing on a cultural system with identifiable features (Lofland & Snow, 2005). The boundaries may be physical such as the walls of a hospital or the perimeters of a neighborhood, or they may be defined by shared identities (e.g., gang members, a professional football team, runaway adolescents). Ethnographic inquiry means operating on several levels simultaneously to infer the tacit rules of the culture or subculture from the myriad of actions and interactions being witnessed. The staple of ethnographic data is the *field note*, a meticulous record of what is (or was) observed. Field notes are rarely scintillating reading, but there is no substitute and the sooner done, the better (memory fades quickly). Chapter 5 offers more details on ethnographic methods and Box 2.1 provides an example of an ethnographic study.

Ethnography as a methodology is nonprescriptive and thus offers considerable latitude, but this freedom comes at a price. Ample time and labor are needed to get it right (and what is right is not always agreed-upon or apparent). Nevertheless, ethnographic methods have enjoyed increasing popularity among qualitative researchers seeking to capitalize on their unique contribution to understanding (Bernard & Gravlee, 2014).

BOX 2.1 COMPASSIONATE CONFINEMENT: ETHNOGRAPHY IN A JUVENILE DETENTION CENTER

Laura Abrams and her colleague, Ben Anderson-Nathe, acted on a shared interest in juvenile corrections to conduct an ethnographic study at Wildwood House (a pseudonym). Gaining entrée is rarely without snags,

but criminal justice facilities are notoriously resistant. Having the acquaintance of the facility director who, in turn, supported research proved to be pivotal for Abrams and Anderson-Nathe.

In their book entitled *Compassionate Confinement* (2013), the authors describe the study and its inevitable twists and turns. Having access did not translate into ease in gaining assent from the young people or from the parents and guardians they sought out during visiting hours. Forbidden from offering incentives, Abrams and Anderson-Nathe relied on prolonged engagement and trust building to encourage residents to speak freely and privately (the facility provided office space for one-on-one interviews). Taking turns with weekly field observation over 16 months produced copious field notes entered into two columns—the left-hand column a long running descriptive commentary on what was being observed and the right-hand column reserved for thoughts, memos, journaling, and reactions.

Participation was a constant negotiation—should they join in a pick-up basketball game? Eat together with the boys? The staff? Sit in on therapy groups? As collaborators, they needed to work out shared responsibilities and ensure quality control over data collection and during interactions with staff and directors. Being open to surprises and setbacks and sharing in information-rich meetings and interviews paid off in relatively smooth entrée as well as in ending the study successfully (Abrams & Anderson-Nathe, 2013).

Grounded Theory

Grounded theory (GT) has emerged as the most widely used approach in qualitative research since its debut in the late 1960s (Glaser & Strauss, 1967). Closely aligned with the Chicago School of sociology, GT sparked broad interest fueled by the growing popularity of in-depth interviewing in the 1970s and beyond. GT's procedural instructions helped to demystify qualitative methods and make them accessible to researchers across a wide range of disciplines including social work (Longhofer, Floersch & Hoy, 2013; Oktay, 2012). What also set GT apart was its rejection of grand theories in favor of “small t” theories with less ambition but more authenticity or “groundedness.” This was a revelation for its time, since the 20th century was an era of soaring and ambitious theories (Freud, Marx, Sartre, Foucault) of which few were amenable to measurement and testing.

GT has evolved significantly over the years, surviving a dispute between Glaser and Strauss (the latter of whom was joined by Juliet Corbin in subsequent works). The early parting of ways led Strauss into academia (University

of California at San Francisco) and Glaser into establishing the Grounded Theory Institute. Differences between the two pivoted on Strauss's later published works, which offered more in-depth instruction in the methods (Corbin & Strauss, 2007). In contrast, Glaser (2002) emphasized less structure and more emphasis on theoretical conceptualization. Despite such differences, GT has grown enormously in popularity over the years and its accessibility has undoubtedly led to the wider acceptance of qualitative methods.

The central goal of a GT study is to explain a process or action. Thus, it does not have the freeze-frame approach common in phenomenological analysis and traditional ethnography. The object of a GT study is often a life transition—Glaser and Strauss's (1965) classic study of dying patients formed the cornerstone for the methodology. The dynamism inherent in GT comes from individual interviews with persons undergoing (or having undergone) a transition or life change. This can be fairly routine (e.g., going to college) or highly unusual (e.g., winning the lottery). Sample sizes in GT are moderate (20 to 30 is about right, but samples can be smaller or larger).

While Chapter 6 will feature much more information on GT data analysis, a summary can be offered here. GT entails *inductive coding* from the data, *memo writing* to document analytic decisions, and weaving in theoretical ideas and concepts without permitting them to drive or constrain the study's emergent findings. In an elegant inversion of the theory-driven deduction common to quantitative research, GT has made the pursuit of midrange theories a respectable, even desirable outcome of qualitative research.

Cycling between data collection and analysis, GT begins with *open coding* of interview transcripts. The process of coding may use *sensitizing concepts* drawn from the literature, extant theories, and previous research, but its primary goal is inductive. Coding proceeds to axial and selective phases, gradually creating a parsimonious conceptual framework featuring *categories*. Along the way, the researcher employs *constant comparative analysis* to examine contrasts across respondents, situations, and settings. The concept of *saturation* is used to guide when data collection and analysis comes to an end. Saturation is achieved when new participants (or codes or themes) are redundant and no longer contributing new information.

There are challenges to conducting a GT study, for example, recognizing when saturation has occurred or when theoretical sampling should be undertaken. The features that make GT attractive—relatively codified procedures and guidance—can also constrain creativity. Yet the concerns many qualitative researchers have about GT are not with the methods per se but with how they are applied. A kind of “GT lite” has emerged in the research literature in which codes and themes are the endpoint, and the study does not carry

through to completion the development of categories and their properties and a fully articulated grounded theory. Box 2.2 features a comprehensive grounded theory study that endures as an exemplar.

BOX 2.2 SURVIVING CHILDHOOD SEXUAL ABUSE: AN EXEMPLARY GROUNDED THEORY STUDY

In their grounded theory study of 11 women who had survived childhood sexual abuse, Susan Morrow and Mary Lee Smith (1995) give the lie to assertions that “small n” qualitative studies cannot be rigorous and productive of valuable knowledge. A diverse group of participants, the women were interviewed individually and a subgroup of seven became a 10-week ongoing focus group that also contributed to the study as coresearchers. To give substance to their claims of *evidentiary adequacy* (Erickson, 1986), Morrow and Smith reported that the data consisted of “over 220 hours of audio- and videotapes which documented more than 165 hours of interviews, 24 hours of group sessions, and 25 hours of follow-up interactions” over a 16-month period (1995, p. 25). Supplemented by 16 hours of audio-taped field notes and reflections, the data amounted to over 2,000 pages of transcriptions, field notes, and documents.

Meticulously following grounded theory procedures, Morrow and Smith identified over 160 different coping strategies adopted by the women. Further analysis and interpretation yielded categories that were interconnected in explaining how the coping strategies and survival emerged, intervening phenomena, and the consequences of the strategies when used. Each category was fully described and illustrated with quotes from the women. In addition to delineating cognitive and psychological responses to sexual abuse, Morrow and Smith note the resilience and forbearance of the women as survivors rather than victims.

Case Study Analysis

Although case studies are not exclusively qualitative, they have a long and honorable history in qualitative research (Feagin, Orum, & Sjoberg, 1991). The term *case study* can be confusing as it refers to both method and product. As studies of “bounded systems of action” (Snow & Anderson, 1991, p. 152), case studies draw on the ability of the qualitative researcher to extract depth and meaning in context. A specific location—a pediatric ward, an immigrant neighborhood or a nursing home—can be

the focus of a case study. A “case” may also be a pivotal event, for example, a landmark Supreme Court decision or the closing of a military base. Case studies often play an important role in program evaluation (Greene, 2000). A study of an exemplary hospice program, for example, can offer insights into best practices.

Noteworthy events can provide an opportunity to explore historical and social changes. Eric Klinenberg’s *Heat Wave* (2002) used media reports, documents, and interviews to provide a “social autopsy” case study of the disastrous effects of Chicago’s 1994 heat wave on the elderly poor. Regardless of its subject matter, the case study draws on multiple perspectives and data sources to produce contextually rich and meaningful interpretation. In this regard, it is important to distinguish case studies in qualitative research from their counterparts in clinical training and business education. Clinical cases—a commonly used pedagogical tool for training students in psychiatry, psychology, nursing, and social work—illustrate the application of clinical theories to individual cases. Similarly, business schools use detailed cases of entrepreneurial successes or failures as learning tools. In qualitative research, the case study is a method of inquiry for knowledge development that necessitates systematic processes of data collection and analysis (Donmoyer, 1990).

How does one carry out a qualitative case study? There are a number of useful how-to guides (Gerring, 2007; Hancock & Algozzine, 2006; Merriam, 1998; Mills, Derepos, & Wiebe, 2010; Stake, 2005; Yin, 2013). Of these, the most frequently cited authorities are Robert Yin and Robert Stake. Yin and Stake employ somewhat different approaches (Yin associated with positivist epistemology and Stake tending to adhere to constructivist interpretations). Although the terminology varies, the instruction in the methodology by Yin and Stake has much in common.

According to Stake (1995), case studies fall into three types: *intrinsic*, *instrumental*, and *collective*. An intrinsic case study is suitable for an exploratory topic or one that is rare or vivifying enough to merit description and analysis. An instrumental case study has a larger purpose, that is, to exemplify or demonstrate something, to develop theory, or to evaluate and critique. In other words, the case is a means to an end rather than an end in itself. The collective case study corresponds to multiple case analyses and is more likely to aggregate instrumental than intrinsic cases (Stake, 2005).

The first step for the researcher is one of bounding the case in space and time. If the subject matter is a discrete event, the boundaries are set and recognizable. If the topic of interest can be tagged to a number of cases, for example, welfare agencies adjusting to a dramatic change in

policy, it is incumbent on the researcher to make clear which agency (or agencies) will be studied and why. Circling back to Stake's typology, the discrete and rare case is more likely to be intrinsic; the nondiscrete and nonrare case is more likely to be instrumental. In a study of a single case, it may be intrinsic or instrumental, but it should be compelling enough to warrant investigation.

Once the case(s) have been identified, data collection begins. Although true in other types of qualitative research, the use of diverse sources of data is critical in case studies, for example, interviews, observation, and archival documents. Using these data, the researcher puts together a thorough description of the case, its origins, its development, and any change over time. If the case has component parts, these are described and their relationship explained. The larger context is also described as it influences the case—social, cultural, political, and economic conditions.

If there is more than one case, the researcher takes the extra step of identifying common themes or patterns across the cases. Here, the challenge is one of aggregating across cases while maintaining the distinctive nature of each case (Campbell & Arens, 1998; Ragin, 1987; Stake, 2005; Yin, 2013). This can be a messy process, and it is invariably iterative, that is, reading and rereading notes and interviews to bring fresh insights and ideas. Keeping the case intact can produce different types of findings, for example, cases are often clustered into types that are mutually exclusive and exhaustive. Typology development done this way stands in contrast to codes drawn from interviews. Challenges of case study analysis include selecting the right case(s), gathering sufficient data, and analyzing multiple cases without sacrificing the holistic qualities of each.

Case studies resemble ethnography in their emphasis on holism and use of multiple data sources (and Box 2.3 shows both may be used in tandem), but the researcher's motives for conducting the study usually differ. Ethnography is dedicated to cultural analysis; its vitality comes from "thick description" of beliefs and behaviors. For example, an ethnographer interested in a breakaway religious sect might use participant observation, interviews, and documents (letters, religious tracts, etc.) to understand it as a subculture with its own norms and beliefs governing members' behavior. The same group could be the subject of a case study analysis, an intrinsic case study if its inner workings are worth describing to a larger audience or an instrumental case study exemplifying psychological control over others or as part of a larger societal move toward fringe religious beliefs. When the object(s) of inquiry require holism over disaggregation, case study analysis is most likely the route to take.

BOX 2.3 INTRODUCING AN EVIDENCE-BASED PROGRAM INTO A HOSTILE SETTING: A CASE STUDY USING ETHNOGRAPHIC METHODS

Felton (2003) used ethnographic methods to carry out a case study that portrayed the tumultuous introduction of an innovative evidence-based practice known as Housing First (HF) in a suburban New York county. Adopting a constructivist approach featuring local actors' perspectives, she conducted interviews with a variety of stakeholders affected by this abrupt change in policy, including county officials overseeing social services, mental health providers, homeless shelter operators, and HF staff.

Opposition to HF was vociferous and rooted in a fear that this new approach—which placed homeless persons with serious mental illness directly into their own apartments without demonstrating “housing readiness”—was irresponsible and dangerous. Despite previous experiences resulting in no such dire consequences, the opposition began with letters to the newspaper and built into an organized town hall meeting in which county officials and representatives of the HF agency were accused of improper contract negotiations as well as flagrant disregard of community norms.

Using documents as well as interviews—news stories, letters to the editor, service contracts, county budget reports, and local housing reports—Felton delved deep into her case and wove together an account of how innovation took place in volatile circumstances that eventually settled peacefully into a “new normal.” The opposition was neither a grassroots community movement nor was it orchestrated by business leaders as might be expected. It was, instead, the creation of local shelter providers fearful of losing ground to a new model that might supplant them. In time, the HF program gained a foothold and proved effective in housing the homeless, and yet this did not result in the shelter's demise. In retrospect, Felton's case study is both intrinsic and instrumental, that is, it has depth and texture coming from many interviews with stakeholders, but it also transcends the particulars of time and place to offer insights into larger issues attending innovations in human services.

Narrative Approaches

Narrative approaches (NA) have tremendous intuitive appeal given their emphasis on the power of the spoken word (Andrews, 2014; Czarniawska, 2004; Mattingly, 1998; Mishler, 1986; Polkinghorne, 1988; Riessman, 2008;

Wells, 2011). Indeed, their popularity and widespread invocation have extended the utility of narratives into therapeutic and self-help domains in which clients are asked to “re-story” their lives (White & Epston, 1990). Our interest is with NA as a diverse set of research methods focusing on how something is said as well as what is said.

Rooted in literature, history, and sociolinguistics, narrative approaches start from the premise that speaking and writing are forms of meaning-making (Frank, 2010). As such, NA methods work best when studying one (or a few) individuals and the topic lends itself to “narrativizing” of some kind (Clandinin & Connelly, 2004). Life histories, biographies, folk tales, and psychotherapy sessions are fertile ground for studies in “narrative knowing” (Polkinghorne, 1988.)

The popularity of narratives has prompted greater scrutiny into their role in relation to personal identity and the creation of the self (Snow & Anderson, 1987). The interrelatedness of the self and narrative can be illustrated by the ways that personal stories evolve to enhance their personal meaning and the teller’s psychological well-being. Trauma survivors, for example, often adjust their narratives over time to enhance comfort and meaning (e.g., “it must have happened for a reason”). Some researchers express concerns about conflating narrative and self, stating that this results in linguistic reductionism of complex inner “conversations” and cognitions (Smith & Sparkes, 2006). Spotlighting texts can crowd out larger contexts as well as the existence of nonnarrated “selves.” For example, a study of elderly South Africans that left out the historical context of apartheid would be a missed opportunity.

Moving to context shifts the standpoint from micro-examinations of text to the dialogic interaction that produced the narrative and from there to broader environmental influences (Frank, 2012; Riessman, 2008). Although the dialogue of interest is usually between the researcher and participant, it may occur among participants and be witnessed or recorded by the researcher. Interactions between social workers and their clients or between parents and children often contain important narratives or conversational content.

When the focus is on dialogue rather than narrativizing, the NA may be *conversation analysis* (CA) or *discourse analysis* (DA). With roots in sociology and ethnomethodology (Gubrium & Holstein, 2000; Sacks & Garfinkle, 1970), CA examines sequencing, turn taking, “holding the floor,” interruption, and other aspects of conversation that reveal how social roles and identities are manifested during talk (Farnell & Graham, 2000). Audiotaped transcriptions of conversations can be analyzed with CA to offer clues to how interpersonal communication both shapes and reflects social interaction (Sidnell & Stivers, 2013). Angell and Bolden (2015) used

CA to analyze transcripts of 36 conversations between psychiatrists and patients with serious mental illness to understand how medications were prescribed and rationalized.

Discourse analysis (DA) emerged as a technique for identifying the social meanings reflected in talk and text (Fairclough, 2003; Gee, 2005). Meaning can be ascertained from a variety of indices, including choice of words and idioms, speaking rhythm and cadence, inflection, intonation, gestures, and nonverbal utterances (groans, sighs, laughter, etc.). Foucauldian discourse analysis, which draws on Foucault's critiques of hegemonic power, tends to operate at a more abstract level than the everyday discourses of interest to most qualitative researchers. Standing in contrast to such analyses are the best-selling books by sociolinguist Deborah Tannen (1990, 2006) in which she explores how men and women "just don't understand" one another and analyzes the volatile communications between mothers and daughters. Both CA and DA depend on transcripts of conversations, but their analytic power is enhanced by recording nonverbal sounds as well as behavior.

There is an inherent understanding that interpretation—whether done by the researcher alone or in collaboration with the participant—is essential to all NA. By their nature, narratives are retrospective accounts not intended to be factual reproductions. This of course begs the question of what and how. The rise of postmodernist thinking with its focus on textual exegesis was a natural fit with narrative analysis, although far from the only influence.

What are the data analytic methods of NA? Labov's microstructural classification and labeling method has attained popularity as both a stand-alone technique and starting point. Riessman (2008) notes that the integrity of the narrative and its constituent parts is a necessary yet rarely sufficient step in data analysis. Recognizing that the narrative is located in larger contexts—in time, place, and audience—leads one to broader analytic goals. The story is kept intact, but—similar to case study analysis—one may "theorize from the case rather than from component themes (categories) across cases" (Riessman, 2008, p. 53). Pederson's (2013) study of job loss narratives used thematic analysis to create a typology of identities describing individual responses to unemployment.

Studies of narratives and speech fill an important niche within qualitative methods, highlighting the importance of language at the interpersonal level but also within larger social and political contexts. With an emphasis on the ways that language shapes (not simply mirrors) reality, they bring a natural fit with constructivist interpretations. Gender, race, and other social inequalities permeate the way we speak to one another and how we narrativize our life experiences.

Phenomenological Analysis

Phenomenological analysis (PA) owes much to the early 20th-century philosophical writings of Edmund Husserl and Martin Heidegger and to later developmental work in psychology, education, and nursing (Lopez & Willis, 2004). Indeed, a proper introduction to PA requires engaging with phenomenological philosophy and its underlying assumptions. Foremost among the latter is the awareness that reality is a product of one's consciousness, and the traditional boundaries between subject and object are an artifact of the "empirical turn" in philosophy and science in the 20th century.

One carries out a phenomenological study by first identifying the phenomenon of interest. This is not a trivial question as some phenomena are more worthy of study than others. Most topics in PA have resonance as aspects of the human condition that run deep, for example, cancer treatment, adopting a child, or grief over the loss of a spouse. PA puts the focus on deeper meanings achieved by prolonged immersion, that is, capturing the lived experience. Analyses of phenomenological interview data are conducted to find the "essence" or common themes in their experiences. Phenomenological findings explore not only what participants experience but also the situations and conditions surrounding those experiences.

The above description contains the common elements of what have become distinct yet overlapping approaches in PA. Following van Manen (2002) in the field of education, *hermeneutic phenomenology* involves the analysis of texts describing the phenomenon or experience (these may be interview transcripts or other written materials). The researcher is the interpreter or mediator of the varied meanings that such texts yield. Perhaps not surprising given phenomenology's concern with cognition, the discipline of psychology has several leading proponents including Moustakas (1994), Giorgi (1985), and Smith (1996).

Moustakas follows a *transcendental phenomenology* approach that foregrounds the need for "bracketing," or sidelining preconceptions about what is real (what Husserl terms *epoché*). Thus, the researcher is not entirely absent from the study but makes a concentrated effort to be self-aware enough not to intrude on the essential aspects of participant's accounts. Also heavily influenced by Husserl are Giorgi's *descriptive phenomenology* (1985, 2009) and a body of phenomenological research that emerged under Giorgi's leadership at Duquesne University.

Psychology also gave rise to *interpretive phenomenological analysis* (IPA). As described by Smith (1996), IPA is closely aligned with health psychology but also owes a debt to symbolic interaction theory given the latter is concerned with meaning making by individuals (Blumer, 1969). Similar to van

Manen's (1990) framing of the researcher's role as involved rather than "bracketed," Smith refers to a "double hermeneutic" in which participants are trying to make sense of their experiences, and the researcher is trying to make sense of their making sense (Smith & Osborn, 2009, p. 53). The possibilities of using IPA are many, and research topics naturally arise: How do women experience menopause as a life transition? What is the lived experience of Asperger's syndrome? How do sex offenders adjust to life after prison?

The field of nursing has also contributed to PA with work by Munhall (2012) and a guide to hermeneutic PA (Cohen, Kahn, & Steeves, 2000). In social work research, PA is less common, but examples are growing in number. Armour and colleagues used hermeneutic PA to study individuals who lost loved ones to homicide (Armour, Rivaux, & Bell, 2009), and IPA has been applied to research topics central to social work such as foster care (Houston & Mullan-Jensen, 2011)

Methods of data collection and analysis bear a marked resemblance across the different PA approaches. PA interviews with around 6 to 10 participants (this number can be smaller or larger) begin with broad, open-ended questioning to ensure the rapport and openness necessary to access their lived experiences. Multiple interviews with each participant are needed to achieve needed depth. Reading (and rereading) interview transcripts and any other data, the researcher flags key statements, quotes, and contexts and begins the painstaking process of examining these across participants' accounts. These are typically clustered into composite themes that form the architecture of the findings. Moustakas (1994) urges researchers to include a section in the report documenting their perspectives and experiences in conducting the study.

PA clearly occupies an important niche in the qualitative methods family, as no other approach seeks to ensure that readers feel as if they have "walked a mile in the shoes" of study participants. At the same time, it shares with other qualitative methods considerable latitude in how a particular study is carried out and evaluated as successful. Subtypes of PA tend to be more philosophically than methodologically distinct, and researchers uncomfortable with exploring the philosophical foundations of PA risk depriving it of its original strengths.

Action and Community-Engaged Research

Action research (AR), traceable to the seminal work of Kurt Lewin (1946), has roots in pragmatism (Tandon, 1996) as well as 1960s liberation movements. Closely linked to *participatory action research* (PAR) and *community-based participatory research* (CBPR), AR shares with PAR and

CBPR fundamental commitments to community empowerment and egalitarian partnerships (Reason & Bradbury-Huang, 2013; Stringer, 2013).

These approaches fit loosely under the broader category of community-engaged research (CER). CER refers to studies that are dependent on a level of community involvement that may or may not entail an action or participatory component. Virtually any study conducted in a community (however defined) might be CER, but the implication here is that some degree of active engagement with the community is conducted. Moreover, that engagement is respectful of local norms and sensitive to the impact of the research on the community.

All CBPR and PAR is CER, but not all CER has an action or participatory component. Here is a hypothetical example of CER that is not CBPR or PAR: researchers are interested in conducting household interviews and ethnographic observation in a neighborhood beset by local gangs. In this instance, communal action is not a safe option and could split the community into factions. Instead, the researchers rely upon a low-intensity, friendly but unintrusive presence in the neighborhood. Their observation (of gang tags or graffiti on buildings, of gathering spots for young adults, of the presence of children and the elderly (signaling a sense of safety) is paired with household interviews regarding residents' strategies for protecting their families. In this example, organizing for action might come later on but is inappropriate given safety concerns as well as a lack of understanding of the context of gang activity.

The popularity of CBPR can be traced to post-1960s movements advocating community empowerment in general (Fals-Borda, 1998; Freire, 1973) and power sharing in research in particular (Foster-Fishman, Berkowitz, Lounsbury, Jacobson, & Allen, 2001; Nelson, Ochocka, Griffin, & Lord, 1998). Impetus has also come from pragmatic concerns surrounding the necessary (but complicated) move away from academic-based, controlled trials to "real-world" interventions in communities (Hohman & Shear, 2002). The problems attending such a change, often dismissed as "noise" by quantitative researchers, include low rates of recruitment and high rates of study attrition. Feasibility and relevance—clinical, cultural, and social—suffer when there is little or no buy-in from a community.

Closely linked to public health but also gaining ground in other fields (Danso, 2015; Jones & Wells, 2007), CPBR is a natural fit for qualitative researchers in social work and other practicing professions. CBPR can be seen as embracing "three Ps." In other words, it is a *perspective* that infuses a study from start to finish; it connotes a *partnership* of equals among researchers and community participants; it requires active *participation* by all parties. CBPR partnerships tend to work best when all parties are willing to commit time and resources. The potential for methodological trade-offs

and compromises is considered worth the benefits in the form of community-led improvements in health and well-being (Cornwall & Jewkes, 1995; Israel, Eng, Schulz, & Parker, 2005). Although not inherently qualitative or quantitative in methodology, PAR and CPBR rarely operate without qualitative methods, either as stand-alone or as part of mixed methods. All involve a degree of local immersion and engagement that fits well with low-threshold qualitative methods and a “nothing about us, without us” ethos (Nelson et al., 1998).

Challenges come from the need for time to build and nurture the partnership, from the compromises needed to reach consensus and make progress toward shared goals, and from different, sometimes conflicting, priorities among stakeholders. Because time and resources are almost always limited, a premium is put on abbreviated and focused methods that can yield findings in a short turnaround time and having wide-reaching impact. Clearly, not all research topics point to CER, PAR, or CBPR, nor are these approaches easy in any sense of the word. Yet their contribution to applied and practice-oriented research is unique, and the mutual respect they engender is a welcome change from the usual one-sided power relationships of researchers and study participants.

The popularity of CBPR has spawned online resources for researchers (see the list at the end of this chapter). Moreover, definitions of *community* have stretched beyond geographic boundaries to include groups based upon shared identities, workplaces, and aspirations. In one such study led by Rogerio Pinto, the *community* is comprised of HIV providers in New York City, a diverse group of nonprofit organizations with services ranging from medical clinics to housing to mental health care. With an emphasis on understanding inter-agency collaboration, a community collaborative board oversees the project and shares in decision making at each stage of the study (Pinto, Spector, & Valera, 2011). Box 2.4 offers a cautionary tale of what happens when researchers do not know enough about the “community” they seek to help.

BOX 2.4 THE PRICE OF NOT KNOWING THE COMMUNITY: A FAILED TRIAL OF AN HIV PROPHYLACTIC PRODUCT

An example of the importance of knowing one’s community (and the costly consequences of not knowing) comes from the results of a \$94 million trial of an anti-HIV prophylactic administered in vaginal gel and tablet form (Marrozzo et al., 2015). Published in the *New England Journal of*

Medicine, the trial was conducted with 5,209 African women in Uganda, Zimbabwe and South Africa and concluded, “None of the drug regimens we evaluated reduced the rates of HIV acquisition in an intention-to-treat analysis. Adherence to study drugs was low” (Marrozzo et al., 2015, p. 509).

What happened? The authors point to deception on the part of the women since reported adherence was high, but actual use of the products was low. They recommend that future researchers adopt “measures of adherence that do not rely solely on self reporting and that are not easily manipulated by participants, such as real-time biologic monitoring of drug levels” (Marrozzo et al., 2015, p. 516). However, qualitative interviews with 102 South African women who participated in the trial revealed that adherence was not a simple matter (van der Straten et al., 2014). The requirement of daily use was probably the greatest misstep that caused the trial to fail, as it was burdensome as well as ill suited to the nature of sexual activity with male partners who are migrant workers (Susser, 2015). Moreover, adherence had been found to be higher in studies where the women were asked to apply the gel before and after sex. Taking the time to understand the women’s lives would have saved considerable expense and finger-pointing.

In noting this failure and the Ebola crisis that occurred in Africa later the same year, Susser (2015) writes, “Bottom-up research design may improve results, but this takes time, costs money and disrupts accepted hierarchies. Because funders and donors may not recognize the need to build in the costs of community engagement, studies are more likely to focus on pharmaceutical methods than on strong investment in local participation.”

The Six Approaches Revisited: Change Over Time

Of the six approaches described in this chapter, each has its own genealogy, disciplinary roots, instructions for use, and challenges in application. It is perhaps not surprising that all six have evolved as new adherents have adapted them to fit changing times and research interests. As mentioned earlier in this chapter, Glaser and Strauss went their separate ways in their interpretations of grounded theory, and phenomenological analysis took different forms dependent on the disciplinary proponent. Three major trends have occurred over time that transformed qualitative methods in the 21st century.

First, and perhaps most significantly, several qualitative approaches were influenced by the rise of constructivism and the postmodern debates that

ensued after the 1980s. This influence, championed by leading qualitative methodologists such as Norman Denzin and Yvonna Lincoln, manifested itself in reflexivity and constructivism as well as postmodernist criticism. With regard to the former, narrative and phenomenological approaches had little distance to travel with their predisposition toward social constructions shaped by language or by the reflexive recounting of one's experiences.

Ethnography underwent tremendous change wrought by criticism from native peoples, the disappearance of traditional societies and postmodernist self-doubt. Thus, straightforward description of an assumed reality in a far-away culture (with the investigator remaining invisible in the telling) gave rise to deeper interpretations and multiple realities conducted closer to home. Along the way, ethnography evolved in new directions: on the one hand introspective and on the other hand experimenting with new forms of representation and criticism. Ethnography shifted "from participant observation to the observation of participation" (Tedlock, 2000, p. 465).

Multiple genres flowered, including *critical ethnography* (Kincheloe & McLaren, 2000), *auto-ethnography* (Ellis & Bochner, 2000; Jones, Adams, & Ellis, 2013), *performance ethnography* (Denzin, 2003; McCall, 2000), *feminist ethnography* (Tedlock, 2000), and *institutional ethnography* (Smith, 2005). Turning the first-person account inward to the researcher's own experiences, auto-ethnography brings out the richness of the research experience and the interplay of emotions and positionality. Auto-ethnography and performance ethnography introduced poetry and memoirs as well as literary writing (Clough, 1998; Denzin, 2003). The journal *Qualitative Inquiry* features such works explicitly. *Institutional ethnography* (Campbell, 2004; Smith, 2005) spotlights organizations and the procedures, processes, and discourses experienced by participants. Developed by feminist sociologist Dorothy Smith, the method adopts a critical stance in keeping with Foucault's focus on power relations and inequality.

Anells (1996) and Mills, Bonner, and Francis (2006) find a strong constructivist thread running through grounded theory (even though it is usually the winner in the category of "qualitative method most likely to be postpositivist"). While Corbin and Strauss (2007) stayed fairly neutral epistemologically, constructivist GT was developed by Charmaz (2006), and Clarke (2005) introduced postmodernist thinking into GT using situational analysis. Charmaz distinguishes constructivist from objectivist grounded theory, noting that the former relies on interpretive frames, and the latter focuses on explanation and prediction. *Objectivism* presumes that data have meaning without reference to the context or researcher's role—both Strauss and Glaser accepted this presumption as well as many GT researchers who "discover" theory and emergent concepts as having a "real" existence (Charmaz, 2014).

Constructivist GT fully integrates the researcher into theory making and interpretation. Study participants have their own interpretations, but these are part of a larger enterprise in which the researcher practices reflexivity to ensure the “situatedness” of the knowledge that is produced.

Action and participatory research have strong foundations in pragmatism as they relate to solving real-world problems (Levin & Greenwood, 2001). However, constructivist iterations of CBPR have emerged. Eng and colleagues, for example, cite constructivism as their research paradigm in working with rural African American communities in North Carolina (Eng et al., 2005). In summary, constructivism has found powerful allies among leading qualitative methodologists and has gained influence in many qualitative approaches.

And yet the constructivist and critical turns have not come to dominate qualitative research. As mentioned in Chapter 1, postmodernist ideas generated pushback from some qualitative researchers (Atkinson, 2005). As auto-ethnography and performance ethnography yield personal memoirs and poetic reflections, the scope narrows and turns inward. For researchers interested in broader social, economic, and political concerns, starting (and often ending) at the boundaries of personal experience misses a vital opportunity to engage.

A second major trend has been the blurring of boundaries across the six approaches and growing convergence in some areas such as purposive sampling and thematic analysis. This phenomenon is not necessarily new, as boundary maintenance within qualitative inquiry has never been a priority. Yet recent years have brought a pragmatic willingness to mix and match methods (more on this in the next section of this chapter).

A leader in blending narrative research with other qualitative methods, Cheryl Mattingly (1998) examined occupational therapists in hospital settings, their interactions with patients revealing the power of narratives in cultural constructions of illness. Such “therapeutic narratives” helped to reframe the experience of disability, grounding it in patients’ perspectives and the dialogic interactions with clinicians. In her more recent book *Paradox of Hope: Journeys Through a Clinical Borderland* (2010), Mattingly proposes a “narrative phenomenology of practice” grounded in the experiences of low-income African American families confronting serious illness within the “border zones” of urban hospitals where race, culture, and biomedicine coexist in uneasy tension. At the analytic stage, there has been a converging tendency toward thematic analysis, not only of the codes and categories commonly found in GT but of narratives, case studies, ethnographic data, and phenomenological interviews (more on this in Chapter 6).

The third trend has taken place on a more down-to-earth level as some qualitative approaches have been altered to fit time-limited circumstances. Qualitative researchers in low-resource settings naturally look for ways to truncate the methods without losing rigor. Regrettably, some turn to focus groups as the answer in the belief that group interviews will efficiently yield the same type and amount of information as individual interviews. Focus groups can be extremely useful but not in this role.

More considered attempts to retain the strengths of ethnography led to developing *rapid ethnographic assessment* (REA). Perhaps not surprisingly, most of the pioneering work on REA was done by international health organizations in collaboration with anthropologists. Anthropologists led the way in developing as a means of conducting research in nutrition, sanitation, family planning, and HIV/AIDS (Beebe, 2002; Manderson & Aaby, 1992; Scrimshaw, Carballo, Ramos, & Blair, 1991). Like its parent method, REA is used in culturally specific situations and is not exclusively qualitative. Key informant interviews, for example, could be combined with a survey measuring nutritional intake.

The success of REA is enhanced considerably when one or more of the investigators have prior knowledge of the local culture as well as the requisite methodological skills. It would be difficult to imagine, for example, trying to start a family planning program in eastern Kenya (or East Los Angeles) without knowing a great deal about the governmental agencies and health officers involved as well as local religious beliefs, marital practices, and views on women's roles and rights.

Much less work has been done on adapting time-limited applications of the other qualitative approaches. Indeed, qualitative inquiry continues to be defined by a timeline that is unpredictable and often extended. Although time-sensitive techniques such as REA are needed for public health research and program evaluation, their salience rests on the sturdy foundation of qualitative methods that are developed and carried out in the pursuit of meaning, not deadlines.

Mixing and Matching Qualitative Approaches: Risks and Benefits

As mentioned in the previous section, mixing and matching qualitative approaches has become common. However, a regrettable form of mixing comes from a lack of understanding or clarity in presenting the methods. It is not uncommon, for example, to see a qualitative study that is presented as phenomenological but uses grounded theory coding (Sandelowski & Barroso,

2003). At other times, the lack of clarity stems from terminological confusion associated with the different methods and a lack of consensus on what these methods entail. Thus, some case studies are hard to distinguish from ethnographies because they adopt an in-depth holistic perspective, and grounded theory and phenomenological studies often resemble one another in their reliance on thematic findings. Some narrative researchers use thematic analysis or produce typologies similar to case studies. Qualitative studies often end up in similar places but arrive there via different routes.

Maintaining the integrity of a particular method does not preclude using it along with others. Annells (2006) refers to this as “turning the prism” via methodological triangulation (p. 59). Matters get complicated when considering (1) the different points at which mixing may occur—from interpretive paradigm to overall approach to specific method of analysis and (2) the extent to which one is concerned about paradigm and method congruence. A good example of this can be found in a study by Newman, Fox, Roth, and Mehta (2004) in which they used a side-by-side paradigm approach to study school shootings in Kentucky and Arkansas (predating the Columbine, Virginia Tech, and Sandy Hook tragedies). Newman and colleagues used both positivist and interpretivist lenses, drawing on “factual” data from forensic analyses and court records and also analyzing transcripts of interviews that provided conflicting (and conflicted) accounts by students, school staff, and parents of the shooters as well as the victims.

Mixing approaches and techniques can bring a new synergy. Although less common (and much more likely to be deployed at the analysis stage, hybrid mixing is described by Fereday and Muir-Cochrane (2006) in their blending of the inductive procedures of Boyatzis (1998) with “template style” coding (Crabtree & Miller, 1999) to study nursing performance. Similarly, Wilson & Hutchison (1991) and Beck (1993) followed a side-by-side use of phenomenology and grounded theory as complementary and mutually enriching perspectives.

Mancini (2005) sequentially mixed qualitative methods by carrying out a grounded theory study of persons suffering from severe mental illness, then selecting two of the interviews for discourse analysis. In another example of mixing in sequence, Teram, Schachter, and Stalker (2005) conducted grounded theory interviews with female survivors of childhood sexual abuse enrolled in physical therapy, then shifted to “pragmatic action research” to transform the analyses and findings via working groups of participants and physical therapists. The groups’ joint production of a handbook for health professionals created a deeper, more sensitive set of guidelines for working with abuse survivors.

A few related caveats are pertinent here. First, incongruities can bring complications during the mixing of qualitative approaches. Phenomenological analyses of grounded theory interviews would likely suffer from the lack of deep attunement to meaning and lived experience (Wimpenny & Gass, 2000). Second, mixing carries the risk of “method slurring” (Baker, Wuest, & Stern, 1992) wherein one or both approaches loses its integrity and capacity to make a contribution. This is obviously a greater problem for hybrid than for juxtaposing formats. Finally, not all mixing is done for the purposes of *triangulation* (i.e., contrasting and/or corroboration). As will be discussed in Chapter 8, triangulation is not as straightforward as it sounds.

Introducing Strategies for Rigor and Trustworthiness

One of the most vexing questions in qualitative research centers on defining what is “a good, valid, and/or trustworthy qualitative study” (Sandelowski & Barroso, 2002, p. 2). Glaser and Strauss (1967) addressed this question with a chapter titled “The Credibility of Grounded Theory” in their seminal work; Lincoln and Guba (1985) provided their own discussions of quality, and a number of others have followed suit (Cohen & Crabtree, 2008; Inui & Frankel, 1991; Morrow, 2005; Seale, 2002). Like their quantitative colleagues, qualitative researchers seek respect and legitimacy, their efforts deemed worthy of recognition and wider dissemination. Still, consensus has been elusive on how to achieve this coveted state. Meanwhile, critics of qualitative methods are emboldened by this impasse. How, they ask, can one trust findings from studies where standards are shifting and subject to diverse interpretations?

The volatile landscape of qualitative inquiry virtually guarantees that opinions about rigor will differ, including whether the term itself is appropriate (some qualitative researchers prefer *verisimilitude*). Pivotal to discussions about quality have been different ideas about the role of subjectivity, the stance of the researcher, and who has the authority and legitimacy to judge good versus bad qualitative research. Once distance and objectivity cease to be operating principles, the researcher’s subjectivity is acknowledged and, to varying degrees, managed through reflexivity, or systematic self-awareness. Lincoln and Guba’s concept of *trustworthiness* (1985) comes closest to capturing this phenomenon of quality and accountability in qualitative research. A trustworthy study is one that is carried out fairly and ethically and whose findings represent as closely as possible the experiences of the participants.

Although Chapter 8 is dedicated to this topic in greater and necessary detail, rigor is introduced here for two reasons. First, qualitative researchers do not adhere to quantitative criteria; inappropriate invocations of reliability and validity divert attention from more relevant criteria. Second, qualitative study designs need to pay heed to rigor from the earliest stages. Recommended strategies for rigor constitute a menu of options. Not all are appropriate for a given study, but each merits consideration at the design phase. In no particular order or ranking, these are *prolonged engagement*, *triangulation*, *peer debriefing and support*, *member checking*, *negative case analysis* and *audit trail*. The intrepid reader is invited to skip to Chapter 8 to read more about these strategies.

Qualitative Methods in Program Evaluation and Implementation Research

Qualitative methods in evaluation have a long history in educational research (Cook & Reichart, 1979; Guba & Lincoln, 1981, 1989; Patton, 2002; Scriven, 1967) extending to other professions concerned with program effectiveness—business, public health, public administration, social work, and so on. Program evaluation is set apart not by the methods used but by the goals it fulfills. Thus, randomized experiments are still the gold standard, but the realities of programs operating under uncontrolled and often messy conditions necessitate methodological compromises.

Relying solely on quantitative methods risks losing an understanding of what is happening below the surface (where many a program succeeds or fails in ways unbeknownst to the investigator; Padgett, 2015). Any number of hidden effects may occur. A program may be found successful but not for the reasons assumed. It may appear to be a failure according to the selected outcome measures, but it might have been deemed a success by different methods. Narrow conceptualizations of success (e.g., symptom reduction) may overlook what clients value more (e.g., social support), and positive outcomes may be an artifact of biased sampling or measurement error.

Given the basic distinction between *process* and *outcome* evaluation, qualitative methods are generally associated with the former—that is, the *hows* and *whys* of the program and its inner workings. Qualitative methods are also suitable for *formative* evaluation where the primary goal is improving the program prior to full implementation. Certain facets of a program are difficult to capture and quantify—staff morale, executive decision making, cultural misunderstandings, and client perceptions, among others. In-depth interviews and on-site observation can add significant and

unforeseen insights into how a program is operating in real time and under fluid, changing conditions.

The praxis of qualitative research—with its emphasis on interpersonal relationships, rapport, and trust—is conducive to program evaluations where staff and clients are understandably wary of researchers entering their domain. Listening empathically and taking the time to fit into program activities smooths the way to acceptance and greater cooperation. Another advantage of qualitative methods lies in their contribution to the evaluation's findings. Administrators and policymakers can get lost in (or bored by) a thicket of statistics, but vignettes and direct quotes make a point that is more easily grasped and appreciated. Individual success stories, or lessons learned from failure, are powerful ways to get the message across.

As described in Chapter 1, *implementation science* has arisen in recent years to address what happens when programs and interventions move from controlled testing to real-world conditions in diverse settings (Damschroder et al., 2009; Palinkas et al., 2011). Many evidence-based practices and programs fail during implementation for a variety of reasons, some known but many unknown. An estimated 90% of public youth-service systems, including mental health, education, juvenile justice, and child welfare, do not use evidence-based practices (Hoagwood & Olin, 2002). To what extent is this situation a result of poor translation of such practices from their evidence-demonstrating phase?

Such concerns point to the need for contextual methods sensitive enough to capture what is happening behind the scenes, not just on the stage. Though more often part of mixed methods than stand-alone, qualitative methods are critical to implementation research (Palinkas et al., 2011). It is difficult to imagine any type of implementation study or program evaluation that could not benefit from the qualitative perspective.

Summary and Concluding Thoughts

This chapter introduced six primary approaches in qualitative inquiry—ethnography, grounded theory, case studies, phenomenological analysis, narrative approaches, and action or participatory research. There are commonalities—nonformulaic, iterative designs; in-depth immersion with participants as well as data; insider perspectives; and pattern recognition as a route to analysis and possible theory development. There are also important differences arising from disciplinary influences as well as epistemological preferences. Not always willing to settle for just one, researchers often mix and match qualitative approaches to achieve the most suitable combination

for their needs. Novice researchers are urged to read specialized texts and articles using these varied approaches to get a sense of how investigators make the most of what each has to offer. Qualitative inquiry is steeped in choices and decisions—a qualitative study can be seen as a series of critical junctures in which the decision trail is rarely, if ever, foreordained.

Exercises

1. Go to Google Scholar or use your college/university access to academic journals and locate examples of studies representing each of the six types of qualitative methods presented in this chapter. What types of journals carry these methods? Download and print an article and bring to class for discussion.
2. How would you describe the strengths and limitations of each of the six approaches presented in this chapter?
3. Consider the many options possible in mixing among the six qualitative approaches. Discuss in class which appear most (and least) suitable for mixing.

Additional Readings

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Websites Related to CBPR

<https://mailman.u.washington.edu/mailman/listinfo/cbpr> (news and updates on funding for CPBR)

<https://ccph.memberclicks.net/participatory-research> (resources for CBPR)

<http://depts.washington.edu/ccph/commbas.html> (all-purpose resource site for CBPR)

<https://mailman13.u.washington.edu/mailman/listinfo/cbpr> (listserv for those interested in CBPR)

<http://www.cbprcurriculum.info> (information on CBPR curricula)

<https://mailman13.u.washington.edu/mailman/listinfo/ccph-ethics> (CBPR ethics discussion group)

<https://mailman1.u.washington.edu/mailman/listinfo/communitypartnerlistserv> (community partner discussion group)