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Appendix A An Annotated Glossary of Terms

The definitions in this glossary represent key terms as they are used and defined in this book. Many definitions exist for these terms, but the most workable definitions for us (and we hope for the reader) are those that reflect the content and references presented in this book. We group the terms by approach to inquiry (narrative research, phenomenology, grounded theory, ethnography, case study) and alphabetize them within the approach, and at the end of the glossary, we define additional general qualitative terms that cross all of the five different approaches. In addition to the terms defined in this glossary, see also Given (2008) and Schwandt (2007).

Narrative Research

autobiography This form of biographical writing is the narrative account of a person's life that he or she has personally written or otherwise recorded (Angrosino, 1989a).

autoethnography This form of narrative is written and recorded by the individuals who are the subject of the study (Ellis, 2004; Muncey, 2010). Muncey (2010) defines *autoethnography* as the idea of multiple layers of consciousness, the vulnerable self, the coherent self, critiquing the self in social contexts, the subversion of dominant discourses, and the evocative potential.

biographical study This is the study of a single individual and his or her experiences as told to the researcher or as found in documents and archival materials (Denzin, 1989). We use the term to connote the broad genre of narrative writings that includes individual biographies, autobiographies, life histories, and oral histories.

chronology This is a common approach for undertaking a narrative form of writing in which the author presents the life in stages or steps according to the age of the individual (Clandinin & Connelly, 2000; Denzin, 1989).

epiphanies These are special events in an individual's life that represent turning points. They vary in their impact from minor to major epiphanies, and they may be positive or negative (Denzin, 1989).

historical contexts These are the contexts in which the researcher presents the life of the participant. The context may be the participant's family, society, or the historical, social, or political trends of the participant's times (Denzin, 1989).

life course stages These are stages in an individual's life or key events that become the focus for the biographer (Denzin, 1989).

life history This is a form of biographical writing in which the researcher reports an extensive record of a person's life as told to the researcher (see Geiger, 1986). Thus, the individual being studied is alive, and life as lived in the present is influenced by personal, institutional, and social histories. The investigator may use different disciplinary perspectives (Smith, 1994), such as the exploration of an individual's life as representative of a culture, as in an anthropological life history.

narrative research This is an approach to qualitative research that is both a product and a method. It is a study of stories or narrative or descriptions of a series of events that accounts for human experiences (Pinnegar & Daynes, 2007).

oral history In this biographical approach, the researcher gathers personal recollections of events and their causes and effects from an individual or several individuals. This information may be collected through tape recordings or through written works of individuals who have died or are still living. It often is limited to the distinctly "modern" sphere and to accessible people (Plummer, 1983).

progressive-regressive method This is an approach to writing a narrative in which the researcher begins with a key event in the participant's life and then works forward and backward from that event (Denzin, 1989).

restorying This is an approach in narrative data analysis in which the researchers retell the stories of individual experiences, and the new story typically has a beginning, a middle, and an ending

(Ollerenshaw & Creswell, 2002).

single individual This is the person studied in a narrative research. This person may be an individual with great distinction or an ordinary person. This person's life may be a lesser life, a great life, a thwarted life, a life cut short, or a life miraculous in its unapplauded achievement (Heilbrun, 1988).

stories These are aspects that surface during an interview in which the participant describes a situation, usually with a beginning, a middle, and an end, so that the researcher can capture a complete idea and integrate it, intact, into the qualitative narrative (Clandinin & Connelly, 2000; Czarniawska, 2004; Denzin, 1989; Riessman, 2008).

Phenomenology

clusters of meaning This is the third step in phenomenological data analysis, in which the researcher clusters the statements into themes or meaning units, removing overlapping and repetitive statements (Moustakas, 1994).

epoche, or bracketing This is the first step in “phenomenological reduction,” the process of data analysis in which the researcher sets aside, as far as is humanly possible, all preconceived experiences to best understand the experiences of participants in the study (Moustakas, 1994).

essential, invariant structure (or essence) This is the goal of the phenomenologist, to reduce the textural (*what*) and structural (*how*) meanings of experiences to a brief description that typifies the experiences of all of the participants in a study. All individuals experience it; hence, it is invariant, and it is a reduction to the “essentials” of the experiences (Moustakas, 1994, van Manen, 2014).

hermeneutical phenomenology A form of phenomenology in which research is oriented toward interpreting the “texts” of life (hermeneutical) and lived experiences (van Manen, 1990).

horizontalization This is the second step in the phenomenological data analysis, in which the researcher lists every significant statement relevant to the topic and gives it equal value (Moustakas, 1994).

intentionality of consciousness Being conscious of objects always is intentional. Thus, when perceiving a tree, “my intentional experience is a combination of the outward appearance of the tree and the tree as contained in my consciousness based on memory, image, and meaning” (Moustakas, 1994, p. 55).

lived experiences This term is used in phenomenological studies to emphasize the importance of individual experiences of people as conscious human beings (Moustakas: Giorgi (2009) Moustakas, 1994).

phenomenology of practice describes the “development and articulation of meaning-giving methods of phenomenology” which are based on what van Manen (2014) considers to be the practical examples from the primary literature of phenomenology.

phenomenological data analysis Several approaches to analyzing phenomenological data are represented in the literature. Moustakas (1994) reviews these approaches and then advances his own. We rely on the Moustakas modification that includes the researcher bringing personal experiences into the study, the recording of significant statements and meaning units, and the development of descriptions to arrive at the essence of the experiences. Giorgi (2009) advances a rigorous yet more open approach in his book.

phenomenological study This type of study describes the common meaning of experiences of a phenomenon (or topic or concept) for several individuals. In this type of qualitative study, the researcher reduces the experiences to a central meaning or the “essence” of the experience.

phenomenon This is the central concept being examined by the phenomenologist. It is the concept being experienced by subjects in a study, which may include psychological concepts such as grief, anger, or love.

philosophical perspectives Specific philosophical perspectives provide the foundation for phenomenological studies. They originated in the 1930s writings of Husserl. These perspectives include the investigator’s conducting research with a broader perspective than that of traditional empirical,

quantitative science; suspending his or her own preconceptions of experiences; experiencing an object through his or her own senses (i.e., being conscious of an object) as well as seeing it “out there” as real; and reporting the meaning individuals ascribe to an experience in a few statements that capture the “essence” (Stewart & Mickunas, 1990).

phenomenological reflection According to van Manen (2014), this involves two processes of bracketing (withdrawal) and reduction (constitution of meaning)

structural description From the first three steps in phenomenological data analysis, the researcher writes a description of “how” the phenomenon was experienced by individuals in the study (Moustakas, 1994). The researcher writes a “structural” description of an experience, addressing *how* the phenomenon was experienced. It involves seeking all possible meanings, looking for divergent perspectives, and varying the frames of reference about the phenomenon or using imaginative variation (Moustakas, 1994).

textural description From the first three steps in phenomenological data analysis, the researcher writes about *what* was experienced, a description of the meaning individuals have experienced (Moustakas, 1994).

transcendental phenomenology According to Moustakas (1994), Husserl espoused transcendental phenomenology, and it later became a guiding concept for Moustakas as well. In this approach, the researcher sets aside prejudgments regarding the phenomenon being investigated. Also, the researcher relies on intuition, imagination, and universal structures to obtain a picture of the experience, and the inquirer uses systematic methods of analysis as advanced by Moustakas (1994).

Grounded Theory

axial coding This step in the coding process follows open coding. The researcher takes the categories of open coding, identifies one as a central phenomenon, and then returns to the database to identify (a) what caused this phenomenon to occur, (b) what strategies or actions actors employed in response to it, (c) what context (specific context) and intervening conditions (broad context) influenced the strategies, and (d) what consequences resulted from these strategies. The overall process is one of relating categories of information to the central phenomenon category (Strauss & Corbin, 1990, 1998).

category This is a unit of information analyzed in grounded theory research. It comprises events, happenings, and instances of phenomenon (Strauss & Corbin, 1990) and given a short label. When researchers analyze grounded theory data, their analysis leads, initially, to the formation of a number of categories during the process called open coding. Then, in axial coding, the analyst interrelates the categories and forms a visual model.

causal conditions In axial coding, these are the categories of conditions I identify in my database that cause or influence the central phenomenon to occur.

central phenomenon This is an aspect of axial coding and the formation of the visual theory, model, or paradigm. In open coding, the researcher chooses a central category around which to develop the theory by examining his or her open coding categories and selecting one that holds the most conceptual interest, is most frequently discussed by participants in the study, and is most “saturated” with information. The researcher then places it at the center of his or her grounded theory model and labels it *central phenomenon*.

coding paradigm or logic diagram In axial coding, the central phenomenon, causal conditions, context, intervening conditions, strategies, and consequences are portrayed in a visual diagram. This diagram is drawn with boxes and arrows indicating the process or flow of activities. It is helpful to view this diagram as more than axial coding; it is the theoretical model developed in a grounded theory study (see Harley et al., 2009).

conditional or consequential matrix This is a diagram, typically drawn late in a grounded theory study, that presents the conditions and consequences related to the phenomenon under study. It enables the researcher to both distinguish and link levels of conditions and consequences specified in the axial coding model (Strauss & Corbin, 1990). It is a step seldom seen in data analysis in grounded theory studies.

consequences In axial coding, these are the outcomes of strategies taken by participants in the study. These outcomes may be positive, negative, or neutral (Strauss & Corbin, 1990).

constant comparative This was an early term (Conrad, 1978) in grounded theory research that referred to the researcher identifying incidents, events, and activities and constantly comparing them to an emerging category to develop and saturate the category.

constructivist grounded theory This is a form of grounded theory squarely in the interpretive tradition of qualitative research. As such, it is less structured than traditional approaches to grounded theory. The constructivist approach incorporates the researcher’s views; uncovers experiences with embedded, hidden

networks, situations, and relationships; and makes visible hierarchies of power, communication, and opportunity (Charmaz, 2006).

context In axial coding, this is the particular set of conditions within which the strategies occur (Strauss & Corbin, 1990). These are specific in nature and close to the actions and interactions.

dimensionalized This is the smallest unit of information analyzed in grounded theory research. The researcher takes the properties and places them on a continuum or dimensionalizes them to see the extreme possibilities for the property. The dimensionalized information appears in the “open coding” analysis (Strauss & Corbin, 1990).

discriminant sampling This is a form of sampling that occurs late in a grounded theory project after the researcher has developed a model. The question becomes this: How would the model hold if we gathered more information from people similar to those I initially interviewed? Thus, to verify the model, the researcher chooses sites, persons, and/or documents that “will maximize opportunities for verifying the story line, relationships between categories, and for filling in poorly developed categories” (Strauss & Corbin, 1990, p. 187).

generate or discover a theory Grounded theory research is the process of developing a theory, not testing a theory. Researchers might begin with a tentative theory they want to modify or no theory at all with the intent of “grounding” the study in views of participants. In either case, an inductive model of theory development is at work here, and the process is one of generating or discovering a theory grounded in views from participants in the field.

grounded theory study In this type of study, the researcher generates an abstract analytical schema of a phenomenon, a theory that explains some action, interaction, or process. This is accomplished primarily through collecting interview data, making multiple visits to the field (theoretical sampling), attempting to develop and interrelate categories (constant comparison) of information, and writing a substantive or context-specific theory (Strauss & Corbin, 1990).

in vivo codes In grounded theory research, the investigator uses the exact words of the interviewee to form the names for these codes or categories. The names are catchy and immediately draw the attention of the reader (Strauss & Corbin, 1990, p. 69).

intervening conditions In axial coding, these are the broader conditions—broader than the context—within which the strategies occur. They might be social, economic, and political forces that influence the strategies in response to the central phenomenon (Strauss & Corbin, 1990).

memoing This is the process in grounded theory research of the researcher writing down ideas about the evolving theory. The writing could be in the form of preliminary propositions (hypotheses), ideas about emerging categories, or some aspects of the connection of categories as in axial coding. In general, these are written records of analysis that help with the formulation of theory (Strauss & Corbin, 1990).

open coding This is the first step in the data analysis process for a grounded theorist. It involves taking data (e.g., interview transcriptions) and segmenting them into categories of information (Strauss & Corbin, 1990). I recommend that researchers try to develop a small number of categories, slowly reducing the number to approximately 30 codes that are then combined into major themes in the study.

properties These are other units of information analyzed in grounded theory research. Each category in grounded theory research can be subdivided into properties that provide the broad dimensions for the

category. Strauss and Corbin (1990) refer to them as “attributes or characteristics pertaining to a category” (p. 61). They appear in open coding analysis.

propositions These are hypotheses, typically written in a directional form, that relate categories in a study. They are written from the axial coding model or paradigm and might, for example, suggest why a certain cause influences the central phenomenon that, in turn, influences the use of a specific strategy.

saturate, saturated, or saturation In the development of categories and data analysis phase of grounded theory research, researchers seek to find as many incidents, events, or activities as possible to provide support for the categories. In this process, they come to a point at which the categories are saturated, and the inquirer no longer finds new information that adds to an understanding of the category.

selective coding This is the final phase of coding the information. The researcher takes the central phenomenon and systematically relates it to other categories, validating the relationships and filling in categories that need further refinement and development (Strauss & Corbin, 1990). I like to develop a “story” that narrates these categories and shows their interrelationship (see Creswell & Brown, 1992).

strategies In axial coding, these are the specific actions or interactions that occur as a result of the central phenomenon (Strauss & Corbin, 1990).

substantive-level theory This is a low-level theory that is applicable to immediate situations. This theory evolves from the study of a phenomenon situated in “one particular situational context” (Strauss & Corbin, 1990, p. 174). Researchers differentiate this form of theory from theories of greater abstraction and applicability, called midlevel theories, grand theories, or formal theories.

theoretical sampling In data collection for grounded theory research, the investigator selects a sample of individuals to study based on their contribution to the development of the theory. Often, this process begins with a homogeneous sample of individuals who are similar, and as the data collection proceeds and the categories emerge, the researcher turns to a heterogeneous sample to see under what sample conditions the categories hold true.

Ethnography

analysis of the culture-sharing group In this step in ethnography, the ethnographer develops themes—cultural themes—in the data analysis. It is a process of reviewing all of the data and segmenting them into a small set of common themes, well supported by evidence in the data (Wolcott, 1994).

artifacts This is the focus of attention for the ethnographer as he or she determines what people make and use, such as clothes and tools (cultural artifacts; Spradley, 1980).

behaviors These are the focus of attention for the ethnographer as he or she attempts to understand what people do (cultural behavior; Spradley, 1980).

complete observer The researcher is neither seen nor noticed by the people under study.

complete participant The researcher is fully engaged with the people he or she is observing. This may help him or her establish greater rapport with the people being observed (Angrosino, 2007).

critical ethnography This type of ethnography examines cultural systems of power, prestige, privilege, and authority in society. Critical ethnographers study marginalized groups from different classes, races, and genders, with an aim of advocating for the needs of these participants (Madison, 2011; Thomas, 1993).

cultural portrait One key component of ethnographic research is composing a holistic view of the culture-sharing group or individual. The final product of an ethnography should be this larger portrait, or overview of the cultural scene, presented in all of its complexity (Spradley, 1979).

culture This term is an abstraction, something that one cannot study directly. From observing and participating in a culture-sharing group, an ethnographer can see “culture at work” and provide a description and interpretation of it (H. F. Wolcott, personal communication, October 10, 1996; Wolcott, 2010). It can be seen in behaviors, language, and artifacts (Spradley, 1980).

culture-sharing group This is the unit of analysis for the ethnographer as he or she attempts to understand and interpret the behavior, language, and artifacts of people. The ethnographer typically focuses on an entire group—one that shares learned, acquired behaviors—to make explicit how the group “works.” Some ethnographers will focus on part of the social-cultural system for analysis and engage in a microethnography.

deception This is a field issue that has become less and less of a problem since the ethical standards were published in 1967 by the American Anthropological Association. It relates to the act of the researcher intentionally deceiving the informants to gain information. This deception may involve masking the purpose of the research, withholding important information about the purpose of the study, or gathering information secretly.

description of the culture-sharing group One of the first tasks of an ethnographer is to simply record a description of the culture-sharing group and incidents and activities that illustrate the culture (Wolcott, 1994). For example, a factual account may be rendered, pictures of the setting may be drawn, or events may be chronicled.

emic This term refers to the type of information being reported and written into an ethnography when the researcher reports the views of the participants. When the researcher reports his or her own personal views, the term used is *etic* (Fetterman, 2010).

ethnography This is the study of an intact cultural or social group (or an individual or individuals within the group) based primarily on observations and a prolonged period of time spent by the researcher in the field. The ethnographer listens and records the voices of informants with the intent of generating a cultural portrait (Thomas, 1993; Wolcott, 1987).

etic This term refers to the type of information being reported and written into an ethnography when the researcher reports his or her own personal views. When the researcher reports the views of the participants, the term used is *emic* (Fetterman, 2010).

fieldwork In ethnographic data collection, the researcher conducts data gathering in the “field” by going to the site or sites where the culture-sharing group can be studied. Often, this involves a prolonged period of time with varying degrees of immersion in activities, events, rituals, and settings of the cultural group (Sanjek, 1990).

gatekeeper This is a data collection term and refers to the individual the researcher must visit before entering a group or cultural site. To gain access, the researcher must receive this individual’s approval (Hammersley & Atkinson, 1995).

holistic The ethnographer assumes this outlook in research to gain a comprehensive and complete picture of a social group. It might include the group’s history, religion, politics, economy, and/or environment. In this way, the researcher places information about the group into a larger perspective or “contextualizes” the study (Fetterman, 2010).

immersed The ethnographic researcher becomes immersed in the field through a prolonged stay, often as long as 1 year. Whether the individual loses perspective and “goes native” is a field issue much discussed in the ethnographic literature.

interpretation of the culture-sharing group The researcher makes an interpretation of the meaning of the culture-sharing group. The researcher interprets this information through the use of literature, personal experiences, or theoretical perspectives (Wolcott, 1994).

key informants (or participants) These are individuals with whom the researcher begins in data collection because they are well informed, are accessible, and can provide leads about other information (Gilchrist, 1992).

language This is the focus of attention for the ethnographer as he or she discerns what people say (speech messages; Spradley, 1980).

nonparticipant or observer as participant The researcher is an outsider of the group under study, watching and taking field notes from a distance. He or she can record data without direct involvement with activity or people.

participant as observer The researcher is participating in the activity at the site. The participant role is more salient than the researcher role. This may help the researcher gain insider views and subjective data. However, it may be distracting for the researcher to record data when he or she is integrated into the activity.

participant observation The ethnographer gathers information in many ways, but the primary approach is to observe the culture-sharing group and become a participant in the cultural setting (Jorgensen, 1989).

realist ethnography A traditional approach to ethnography taken by cultural anthropologists, this

approach involves the researcher as an “objective” observer, recording the facts and narrating the study with a dispassionate, omniscient stance (Van Maanen, 1988).

reflexivity This means that the writer is conscious of the biases, values, and experiences that he or she brings to a qualitative research study. Typically, the writer makes this explicit in the text (Hammersley & Atkinson, 1995).

structure This is a theme or concept about the social–cultural system or group that the ethnographer attempts to learn. It refers to the social structure or configuration of the group, such as the kinship or political structure of the social–cultural group. This structure might be illustrated by an organizational chart (Fetterman, 2010).

Case Study

analysis of themes Following description, the researcher analyzes the data for specific themes, aggregating information into large clusters of ideas and providing details that support the themes. Stake (1995) calls this analysis “development of issues” (p. 123).

assertions This is the last step in the analysis, where the researcher makes sense of the data and provides an interpretation of the data couched in terms of personal views or in terms of theories or constructs in the literature.

bounded system The case selected for study has boundaries, often bounded by time and place. It also has interrelated parts that form a whole. Hence, the proper case to be studied is both “bounded” and a “system” (Stake, 1995).

case This is the unit of analysis in a case study. It involves the study of a specific case within a real-life, contemporary context or setting (Yin, 2009). The case might be an event, a process, a program, or several people (Stake, 1995). The case could be the focus of attention (intrinsic case study) or the issue and the case used to illustrate the case (Stake, 1995).

case description This means simply stating the facts about the case as recorded by the investigator. This is the first step in analysis of data in a qualitative case study, and Stake (1995) calls it narrative description (p. 123).

case study research This type of research involves the study of a case within a real-life, contemporary context or setting (Yin, 2009).

case themes These are one aspect of the major findings in a case study. In Stake’s (1995) terms, these would be called categorical aggregations, the larger categories derived during case study data analysis and made up of multiple incidents that are aggregated.

collective case study This type of case study consists of multiple cases. It might be either intrinsic or instrumental, but its defining feature is that the researcher examines several cases (e.g., multiple case studies; Stake, 1995).

context of the case In analyzing and describing a case, the researcher sets the case within its setting. This setting may be broadly conceptualized (e.g., large historical, social, political issues) or narrowly conceptualized (e.g., the immediate family, the physical location, the time period in which the study occurred; Stake, 1995).

cross-case analysis This form of analysis applies to a collective case (Stake, 1995; Yin, 2009) in which the researcher examines more than one case. It involves examining themes across cases to discern themes that are common and different to all cases. It is an analysis step that typically follows within-case analysis when the researcher studies multiple cases.

direct interpretation This is an aspect of interpretation in case study research where the researcher looks at a single instance and draws meaning from it without looking for multiple instances of it. It is a process of pulling the data apart and putting them back together in more meaningful ways (Stake, 1995).

embedded analysis In this approach to data analysis, the researcher selects one analytic aspect of the case

for presentation (Yin, 2009).

holistic analysis In this approach to data analysis, the researcher examines the entire case (Yin, 2009) and presents description, themes, and interpretations or assertions related to the whole case.

instrumental case study This is a type of case study with the focus on a specific issue rather than on the case itself. The case then becomes a vehicle to better understand the issue (Stake, 1995). We would consider the gunman case study (Asmussen & Creswell, 1995), mentioned in [Chapter 11](#), to be an example of an instrumental case study.

intrinsic case study This is a type of case study with the focus of the study on the case because it holds intrinsic or unusual interest (Stake, 1995).

multisite When sites are selected for the case, they might be at different geographical locations. This type of study is considered to be multisite. Alternatively, the case might be at a single location and considered a within-site study.

multiple sources of information One aspect that characterizes good case study research is the use of many different sources of information to provide “depth” to the case. Yin (2009), for example, recommends that the researcher use as many as six different types of information in his or her case study.

naturalistic generalizations In the interpretation of a case, an investigator undertakes a case study to make the case understandable. This understanding may be what the reader learns from the case or its application to other cases (Stake, 1995).

patterns This is an aspect of data analysis in case study research where the researcher establishes patterns and looks for a correspondence between two or more categories to establish a small number of categories (Stake, 1995).

purposeful sampling This is a major issue in case study research, and the researcher needs to clearly specify the type of sampling strategy in selecting the case (or cases) and a rationale for it. It applies to both the selection of the case to study and the sampling of information used within the case. We use Huberman and Miles’ (1994) list of sampling strategies and apply it in this book to case studies as well as to other approaches of inquiry.

within-case analysis This type of analysis may apply to either a single case or multiple collective case studies. In within-case analysis, the researcher analyzes each case for themes. In the study of multiple cases, the researcher may compare the within-case themes across multiple cases in cross-case analysis.

within-site When a site is selected for the case, it might be located at a single geographical location. This is considered a within-site study. Alternatively, the case might be different locations and considered to be multisite.

General Qualitative Terms

aesthetic merit A piece succeeds aesthetically when the use of creative analytical practices opens up the text and invites interpretive responses. The text is artistically shaped, satisfying, complex, and not boring.

approaches to inquiry This is an approach to qualitative research that has a distinguished history in one of the social science disciplines and that has spawned books, journals, and distinct methodologies. These approaches, as I call them, are known in other books as “strategies of inquiry” (Denzin & Lincoln, 1994) or “varieties” (Tesch, 1990). We refer to narrative research, phenomenology, grounded theory, ethnography, and case studies in this book as approaches to inquiry.

audit trail This is document that allows a researcher to retrace the process by which the researcher arrived at their final findings.

axiological This qualitative assumption holds that all research is value laden and includes the value systems of the inquirer, the theory, the paradigm used, and the social and cultural norms for either the inquirer or the respondents (Creswell, 2009; Guba & Lincoln, 1988). Accordingly, the researcher admits and discusses these values in his or her research.

central question A central question in a study is the broad, overarching question being answered in the research study. It is the most general question that could be asked to address the research problem.

codebook Also called a master code list, this document contains the record of the codes and categories for a study for the purpose of guiding consistent application of codes either by an individual researcher or across a research team.

coding This is the process of aggregating the text or visual data into small categories of information, seeking evidence for the code from different databases being used in a study, and then assigning a label to the code.

critical race theory This is an interpretive lens used in qualitative research that focuses attention on race and how racism is deeply embedded within the framework of American society (Parker & Lynn, 2002).

critical theory This is an interpretive lens used in qualitative research in which a researcher examines the study of social institutions and their transformations through interpreting the meanings of social life; the historical problems of domination, alienation, and social struggles; and a critique of society and the envisioning of new possibilities (Fay, 1987; Madison, 2011; Morrow & Brown, 1994).

disability interpretive lens Disability is focused on as a dimension of human difference and not as a defect. As a human difference, its meaning is derived from social construction (i.e., society’s response to individuals), and it is simply one dimension of human difference.

encoding This term means that the writer places certain features in his or her writing to help a reader know what to expect. These features not only help the reader but also aid the writer, who can then draw on the habits of thought and specialized knowledge of the reader (Richardson, 1990). Such features might be the overall organization, code words, images, and other “signposts” for the reader. As applied in this book, the features consist of terms and procedures of an approach that become part of the language of all facets of research design (e.g., purpose statement, research subquestions, methods).

epistemological This is another philosophical assumption for the qualitative researcher. It addresses the relationship between the researcher and that being studied as interrelated, not independent. Rather than “distance,” as we call it, a “closeness” follows between the researcher and that being researched. This closeness, for example, is manifest through time in the field, collaboration, and the impact that being researched has on the researcher.

feminist research approaches In feminist research methods, the goals are to establish collaborative and nonexploitative relationships, to place the researcher within the study so as to avoid objectification, and to conduct research that is transformative (Olesen, 2011; Stewart, 1994).

foreshadowing This term refers to the technique that writers use to portend the development of ideas (Hammersley & Atkinson, 1995). The wording of the problem statement, purpose statement, and research subquestions foreshadows the methods—the data collection and data analysis—used in the study.

hyperlinks In qualitative analysis software, a hyperlink allows the electronic cross-referencing between two points link passage within the database for easy retrieval.

impact A piece has an impact when it affects the reader emotionally or intellectually; generates new questions; or moves him or her to write, try new research practices, or move to action.

intercoder agreement This term means that researchers check for reliability of their coding. It involves coding agreements when multiple coders assign and check their code segments to establish the reliability of the data analysis process.

interpretation In qualitative research, this term represents a phase in qualitative data analysis involving abstracting out beyond the codes and themes to the larger meaning of the data.

interpretive framework Beliefs or frameworks that guide the actions of the researcher in conducting a study.

interview protocol The interview protocol is a form in qualitative data collection in which the researcher directs the activities of an interview and records information provided by the interviewee. It consists of a header, the major substantive question (typically five to seven research subquestions phrased in a way that interviewees can answer), and closing instructions.

maximum variation sampling This is a popular form of qualitative sampling. This sampling approach consists of determining in advance some criteria that differentiate the sites or participants and then selecting sites or participants that are quite different on the criteria.

methodological congruence This describes the interconnectedness and interrelatedness of a study purpose, questions, and methods that appears cohesive rather than as fragmented parts (Morse & Richards, 2002; Richards & Morse, 2012).

methodology This assumption holds that a qualitative researcher conceptualizes the research process in a certain way. For example, a qualitative inquirer relies on views of participants and discusses their views within the context in which they occur, to inductively develop ideas in a study from particulars to abstractions (Creswell, 1994, 2009).

observational protocol This is a form used in qualitative data collection for guiding and recording observational data. It typically consists of two columns representing descriptive and reflective notes. The researcher records information from the observation on this form.

ontological This is a philosophical assumption about the nature of reality. It addresses this question: When is something real? The answer provided is that something is real in qualitative research when it is constructed in the minds of the actors involved in the situation (Guba & Lincoln, 1988). Thus, reality is not “out there,” apart from the minds of actors.

paradigm This is the philosophical stance taken by the researcher that provides a basic set of beliefs that guides action (Denzin & Lincoln, 1994). It defines, for its holder, “the nature of the world, the individual’s place in it, and the range of possible relationships to that world” (Denzin & Lincoln, 1994, p. 107). Denzin and Lincoln (1994) further call this the “net that contains the researcher’s epistemological, ontological, and methodological premises” (p. 13). In this discussion, I extend this “net” to also include the axiological assumptions.

philosophical assumptions These are stances taken by the researcher that provide direction for the study such as the researcher’s view of reality (ontology), how the researcher knows reality (epistemology), the value-stance taken by the inquirer (axiology), and the procedures used in the study (methodology). These assumptions, in turn, are often applied in research through the use of theories (or, as we call them, interpretive frameworks).

postmodernism This interpretive perspective is considered a family of theories and perspectives that have something in common (Slife & Williams, 1995). Postmodernists advance a reaction or critique of the 19th-century Enlightenment and early 20th-century emphasis on technology, rationality, reason, universals, science, and the positivist, scientific method (Bloland, 1995; Stringer, 1993). Postmodernists assert that knowledge claims must be set within the conditions of the world today and in the multiple perspectives of class, race, gender, and other group affiliations.

postpositivism This interpretive perspective has the elements of being reductionistic, logical, empirical, cause-and-effect oriented, and deterministic based on a priori theories.

pragmatism This interpretive lens focuses on the outcomes of the research—the actions, situations, and consequences of inquiry—rather than antecedent conditions. There is a concern with applications —“what works”—and solutions to problems. Thus, instead of a focus on methods, the important aspect of research is the problem being studied and the questions asked about this problem.

purpose statement This is a statement typically found in an introduction to a qualitative study in which the author sets forth the major objective or intent of the study. It can be considered a “road map” to the entire study.

purposeful sampling This is the primary sampling strategy used in qualitative research. It means that the inquirer selects individuals and sites for study because they can purposefully inform an understanding of the research problem and central phenomenon in the study.

qualitative research This is an inquiry process of understanding based on a distinct methodological approach to inquiry that explores a social or human problem. The researcher builds a complex, holistic picture; analyzes words; reports detailed views of participants; and conducts the study in a natural setting.

queer theory This is an interpretive lens that may be used in qualitative research that focuses on gay, lesbian, or homosexual identity and how it is culturally and historically constituted, is linked to discourse, and overlaps gender and sexuality (Watson, 2005).

reciprocity This is an aspect of good data collection in which the author gives back to participants by providing rewards for their participation in the study. These rewards may be money or gifts or other forms of remuneration. The idea is that the researcher gives back to participants rather than taking the data from the participant and leaving without offering something in return.

reflexivity An approach in writing qualitative research in which the writer is conscious of the biases, values, and experiences that he or she brings to a qualitative research study. In writing a reflexive passage, the researcher discusses her or his experiences with the central phenomenon and then how these experiences may potentially shape the interpretation that the researcher provides. This passage can be written into a qualitative project in different places in the final report (e.g., methods, vignette, threaded throughout, at the end).

represent the data This is a step in the data analysis process of packaging findings (codes, themes) into text, tabular, or figure form.

research design We use this term to refer to the entire process of research, from conceptualizing a problem to writing the narrative, not simply the methods such as data collection, analysis, and report writing (Bogdan & Taylor, 1975).

research focus We use this term in reference to a general area of study interest such as a study objective or goal. This area of interest typically leads to the researcher narrowing the focus for the need of the study and the specific research problem.

research problem A research problem typically introduces a qualitative study, and in this opening passage, the author advances the issue or concern that leads to a need to conduct the study. We discuss this problem as framed from a real-life perspective or a deficiency in the literature perspective.

rhetorical This assumption means that the qualitative investigator uses terms and a narrative unique to the qualitative approach. The narrative is personal and literary (Creswell, 1994, 2009). For example, the researcher might use the first-person pronoun *I* instead of the impersonal third-person voice.

sample size Sample size in qualitative research generally follows the guidelines to study a few individuals or sites, but to collect extensive detail about the individuals or sites studied.

social constructivism In this interpretive framework, qualitative researchers seek understanding of the world in which they live and work. They develop subjective meanings of their experiences—meanings directed toward certain objects or things. These meanings are varied and multiple, leading the researcher to look for the complexity of views rather than narrow the meanings into a few categories or ideas. The goal of research, then, is to rely as much as possible on the participants' views of the situation. Often these subjective meanings are negotiated socially and historically.

social justice theories These advocacy/participatory theories seek to bring about change or address social justice issues in our societies.

social science theories These are the theoretical explanations that social scientists use to explain the world (Slife & Williams, 1995). They are based on empirical evidence that has accumulated in social science fields such as sociology, psychology, education, economics, urban studies, and communication. As a set of interrelated concepts, variables, and propositions, they serve to explain, predict, and provide generalizations about phenomena in the world (Kerlinger, 1979). They may have broad applicability (as in grand theories) or narrow applications (as in minor working hypotheses; Flinders & Mills, 1993).

subquestions Subquestions are a form of research questions in a qualitative study in which the researcher subdivides the central question into parts and examines these parts. These subquestions are often used in interview and observational protocols as the major topics.

substantive contribution A piece makes a substantive contribution when it contributes to our understanding of social life, demonstrates a deeply grounded social scientific perspective, and seems “true.”

themes In qualitative research, themes (also called categories) are broad units of information that consist of several codes aggregated to form a common idea.

theories or theoretical orientations They are found in literature and provide a general explanation as to what the researcher hopes to find in a study or a lens through which to view the needs of participants and communities in a study.

transformative framework Researchers who use this interpretive framework advocate that knowledge is not neutral and it reflects the power and social relationships within society, and thus the purpose of knowledge construction is to aid people to improve society (Mertens, 2003). These individuals include marginalized groups such as lesbians, gays, bisexuals, transgenders, queers, and societies that need a more hopeful, positive psychology and resilience (Mertens, 2009).

triangulation Researchers make use of multiple and different sources, methods, investigators, and theories to provide corroborating evidence for validating the accuracy of their study.

verisimilitude This is a criterion for a good literary study, in which the writing seems “real” and “alive,” transporting the reader directly into the world of the study (Richardson, 1994).