

ARTICLE

The Pilot Study in Qualitative Inquiry

Identifying Issues and Learning Lessons for Culturally Competent Research

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ABSTRACT

This article discusses the importance of a pilot study in undertaking phenomenological qualitative inquiry for culturally competent research. The pilot work was conducted in preparation for a dissertation on Korean-American family dementia caregiving. The definition and useful functions of pilot studies in qualitative inquiry are particularly identified. To highlight the benefits of pilot work, it describes the specific practical and methodological issues emerging in the pilot exercise as well as the modifications made for the main study as a result of the pilot work. The implementation of the pilot exercise proved to be essential in four ways. These comprise (1) finding issues and barriers related to recruiting potential participants, (2) engaging the use of oneself as a researcher in a culturally appropriate way and from a phenomenological perspective, (3) reflecting the importance of the epoche process and its difficulty in conducting phenomenological inquiry, and (4) modifying interview questions. Finally, the value of sharing the pilot study to develop culturally competent research practice is addressed.

KEY WORDS:

culturally
competent
research

Korean-American

phenomeno-
logical inquiry

pilot study

qualitative study

INTRODUCTION

Although pilot studies may have many useful functions in conducting qualitative research, they have attracted scant attention in research literature. A pilot study is referred to as a feasibility study that comprises ‘small-scale versions of the planned study, trial runs of planned methods, or miniature versions of the anticipated research’ in order to ‘answer a methodological question(s) and to guide the development of the research plan’ (Prescott and Soeken, 1989: 60).

This article presents a critical reflection of the lessons learned from a pilot study using a recently completed work of phenomenological research on Korean-American family caregivers of Alzheimer’s patients. The purpose of this article is twofold. First, it explores the practical and methodological issues arising from the pilot exercise. Second, by showing how the relevant aspects of a main study changed as a result of conducting the pilot study and by placing this experience within a debate on the advantages of pilot studies within qualitative inquiry, it asserts the value of conducting a pilot study in qualitative research.

The structure of this article is as follows. First, it reviews the definition of pilot studies and addresses their functions and the advantages of their implementation. This discussion places more focus on the value of pilot studies and their roles in qualitative rather than in quantitative research. This is followed by a brief description of the pilot study done on which the discussion in this article is based. It then presents four identified practical and methodological areas of discussion. The final section suggests the value of sharing a full report on pilot work in qualitative research to advance research knowledge.

CLARIFYING THE PILOT STUDY: ITS DEFINITION AND FUNCTIONS IN QUALITATIVE RESEARCH

A pilot study is a small-scale methodological test conducted to prepare for a main study and is intended to ensure that methods or ideas would work in practice (Jariath et al., 2000; Prescott and Soeken, 1989; van Teijlingen and Hundley, 2002). Because a pilot study involves a small sample, it is often misused as a small sample study and has been misrepresented as an excuse for not having enough of a sample in some research (Lancaster et al., 2004; Perry, 2001). However, the key feature of the definition of a pilot study does designate a small-scale study designed to inform a main study (Jariath et al., 2000). It implies that the pilot study is intentional and is planned from the beginning of a proposed project and before the actual investigation (Lindquist, 1991; Locke et al., 2000; Perry, 2001). The principal benefit of conducting a pilot study is that it provides researchers with an opportunity to make adjustments and revisions in the main study.

Typically used as a feasibility study, a pilot study can test a research protocol, such as a data collection method and a sample recruitment strategy

(Muio et al., 1995; Prescott and Soeken, 1989; van Teijlingen and Hundley, 2002). It can also be used to assess the feasibility of the proposed research process, including its cultural and local political context (Muio et al., 1995; Perry, 2001; van Teijlingen and Hundley, 2002). Despite the centrality and usefulness of pilot studies, the literature discussing pilot work in general and qualitative pilot research in particular is limited (Beebe, 2007; Hinds and Gattuso, 1991; Jariath et al., 2000; Lancaster et al., 2004; Padgett, 2008; Prescott and Soeken, 1989).

In order to retrieve literature on pilot studies, particularly as it is conducted in a qualitative inquiry, this author searched academic scientific databases such as Social Work Abstracts, Social Services Abstracts, JSTOR, and ISI Web of Knowledge, as well as scholar.google.com using 'pilot' or 'pilot study' as keywords. She also searched for and reviewed qualitative textbooks and published articles in peer-reviewed journals including *Qualitative Social Work*, *Qualitative Inquiry*, *Qualitative Health Research*, *International Journal of Qualitative Methods*, and *International Journal of Social Research Methodology*. It should be noted that the relevant literature retrieved was limited to articles written in English. In order to acquire the explicitly discussed process or outcome of pilot works in qualitative research or both, the author eliminated both the clinical trial pilot work usually done in nursing literature and articles referring to only one aspect of the pilot studies, such as pretest questionnaires, mostly done in quantitative research. This effort revealed a few notable exceptions that explored the benefits of qualitative pilot works and the role these works play in developing the main study (e.g. Kelly, 2007; Kovacs et al., 1999; Padgett, 2008; Sampson, 2004; Williams et al., 2008).

By its very nature, a pilot study may not be intended to produce results; this is probably one reason for the general underreporting of pilot works, as suggested by the editorial comment, 'pilot studies are not usually suitable for publication' (Watson et al., 2007: 619). Moreover, the little discussion of the roles pilots play in qualitative inquiry may result from 'a consequence of methodological allegiances and a tendency to link pilots with more positivist approaches in social sciences' (Sampson, 2004: 383). As Sampson points out, there might be a tendency to understand the roles of pilot works restrictively by assuming that they only refer to testing research instruments; this may prevent achieving the full benefits of pilot exercises.

In fact, there are the inherent difficulties and ambiguities of conducting qualitative pilot studies. Morse (1997) and Perry (2001) implied that there could be no separate pilot work in qualitative research. Their concern is understandable and leads to a consideration of the unique characteristics of qualitative research. Most qualitative studies use an emergent design so that data collection and data analysis in qualitative research are often subject to change once implemented (Denzin and Lincoln, 1998; Marshall and Rossman, 2006; Maxwell, 1996). Additionally, as researchers doing qualitative studies may have experienced,

previous episodes of interview or observation help them to improve their subsequent ones. This does not automatically imply, however, that conducting pilot studies are not essential to doing qualitative research; rather, many practical reasons do exist for conducting pilot works in qualitative inquiry.

When conducting a qualitative inquiry, researchers can pilot a study to assess the acceptability of an interview or an observation protocol or both (Holloway, 1997). A pilot exercise can be especially useful to novice researchers when they assess and prepare their interview and observation techniques. Likewise, pilot works can also be used to self-evaluate one's readiness, capability, and commitment as a qualitative researcher (Beebe, 2007; Lancaster et al., 2004). In this sense, a pilot work can be used to train qualitative researchers (Kilanowski, 2006) and to enhance the credibility of a qualitative study (Padgett, 2008). Furthermore, the systematic use of pilots may enable the uncovering of ethical as well as other key practical issues, such as the sampling procedure, and may provide an opportunity to resolve certain issues that may otherwise hinder the main project (Kelly, 2007; Sampson, 2004). Through piloting, qualitative researchers can focus on, expand, or narrow their proposed research topics and can also gain a clear conceptualization of the focus of the topic (Denzin and Lincoln, 1998; Sampson, 2004; Seidman, 1998; Williams et al., 2008). The final critical function of the pilot exercise relates to identifying specific methodological and epistemological issues so that researchers can affirm, sharpen, or revise how to pursue and achieve their goals in their proposed studies.

In fact, conducting a pilot study with the latter issue in mind is vital to qualitative research preparation. As van Teijlingen and Hundley (2002) argued, researchers have an ethical obligation to share methodological and practical issues emerging from studies done for the development and construction of scientific knowledge. Reports on the lessons learned from and issues identified in the pilot work could be especially helpful and inspire other researchers involved in similar studies (Lanphear, 2001). Within this context, this article discusses the process as well as the outcome of conducting a pilot study when a phenomenological qualitative approach is used. To highlight the benefits of pilot work as well as to further this consideration, four identified areas of discussion are illustrated here.

A DESCRIPTION OF THE PILOT STUDY USED

An Autobiographical Connection to the Study

As a native Korean working on her dissertation within an American academic framework, this author has done clinical social work involving older Americans with dementia. This professional exposure to American familial caregiving and to the use of American social and health care services has provided her with an understanding of western caregiving practice. Moreover, this researcher is a Korean cultural insider acculturated to mainstream US society as both a student

and social work practitioner. This experience has put her in the unique position of a free traveller between Korean culture, Korean-American culture, and American society. This unique position, in conjunction with her professional curiosity, has provided a matrix from which the study of Korean-American family caregivers' experiences emerged as a dissertation.

The area of dementia caregiving has received growing attention due to the increasing numbers of the senior population afflicted with this illness. However, little attention has been paid to studying the issues faced by culturally different populations and their experiences of family caregiving. Because only a limited number of phenomenological studies exist that explore the experiences of caregivers among Korean-Americans with dementia, this author planned to adopt a transcendental phenomenological approach in order to gain an understanding of the experience of dementia caregiving from the perspective of Korean-American family caregivers. Based on Husserlian principles, transcendental phenomenology is translated into a qualitative research method by Moustakas (1994). Through achieving presuppositionlessness, that is transcendental, the aim of this method is to provide relevant information about the context of the phenomenon being studied (Creswell, 1998; Marshall and Rossman, 2006; Moustakas, 1994).

In preparing this study, two concerns became manifest. The first one centred on a main data collection method for phenomenological inquiry. In order to relay the experiences of Korean-American caregivers, it is of foremost importance to let their voices be heard through in-depth interviewing. How possible would it be to have an in-depth interview with Korean-American families known to be reluctant to disclose themselves to strangers even when the researcher is of Korean heritage (Yuen and Kauh, 2002)? The second concern was related to the general perception of dementia in Korean culture. The most common Korean response to memory problems and associated behaviour in elderly people is to see these as normal consequences of getting old (Kim, 2002). Koreans may also identify dementia primarily by the irrational behaviour of persons suffering from this illness and the disruptive social and interpersonal consequences it shares with mental disorders (Yoon and Cha, 1999). In any case, this perception of dementia triggers strong negative responses among Korean families, such as feelings of stigma and shame, and often inhibits them from seeking diagnosis and outside assistance (Yoon and Cha, 1999). Due to this negative impression of dementia, it might be even more difficult to recruit Korean-American families for interviews about their caregiving experience than to recruit families from other ethnicities.

The Pilot Study: Its Incubation and Development

Before the project was fully undertaken, the decision to implement a pilot exercise was made whose primary aim would be to test the feasibility of the

proposed study. Specifically, the rationales for undertaking the pilot were: (1) to see if the research methods could be effected on the matter of dementia caregiving with this population and (2) to test an interview protocol. It was also hoped that (3) any other practical issues and difficulties could be discovered to see if they could be resolved before the main project began. After obtaining a Human Subjects Review Approval for the pilot, two Korean-American caregivers were recruited for this exercise. The methods of data collecting used in this pilot were in-depth interviewing and two types of personal documents, field notes and a journal log, which permitted reflections of this pilot experience to be made. Semi-structured interviews were conducted at the participants' homes, their choice of locations. Each interview, conducted in Korean, was one- to one-half-hour long, and was recorded on a tape recorder as well as on an MP3 player voice recorder. At the end of each interview, a member check was made as part of the necessary process for establishing credibility (Lincoln and Guba, 1985). The author summarized what the respondents had said and requested verification and amendments. In this pilot, member checking was also used to receive feedback on the pilot process.

The following section presents the issues identified and lessons learned in carrying out the pilot work.

DISCUSSION ON IDENTIFIED ISSUES AND LESSONS LEARNED FROM THE PILOT STUDY

Discussion 1: Finding Issues and Barriers Related to Recruiting Potential Participants

According to the literature, Korean-Americans are described as hard-to-reach populations (Han et al., 2007; Kim et al., 2006; Yuen and Kauh, 2002) due to the difficulty associated with recruiting them for scientific research and especially for interviews. The main reason for the participants' refusals was related to their being unfamiliar with scientific research and uncomfortable with disclosure (Yuen and Kauh, 2002). They tended to be discomfited with a direct approach by a researcher (Han et al., 2007). Due to these obstacles researchers working with Korean-Americans invented strategies for recruiting them. By examining the Korean cultural values of strong feelings for kinship and applying them in research contexts, Kim and his research team (2006) suggested that researchers identify major community organizations or leaders or both who would be helpful in recruiting potential study participants to create an atmosphere of 'we' or togetherness with them. Han and co-researchers (2007) also raised the issue of the critical role gatekeepers play in recruiting potential participants. By engendering cultural values and developing interpersonal relationships with authority figures in the community, access to potential participants may be gained much easier rather than by merely aiming for individual samples.

Simply said, building liaisons with community gatekeepers can provide access to potential participants.

Following these recommendations, the initial effort to recruit participants in the pilot study included contacts with one Korean physician and with the directors of two community centres serving the Korean elderly and their families in urban daycare settings. However, at the time of contact, there had been no Korean patient with dementia in the physician's current practice. One agency flatly refused to cooperate by explaining that the clients and staff had unpleasant experiences with previous researchers and their inconsiderate research practices. One staff member mentioned that he felt they had been used by researchers who seemed to take the agency's cooperation for granted. The director suggested a minimum of six months of volunteering in the agency in exchange for their cooperation. However, the author was unable to respond to this request for reciprocity due to concerns over time pressure in completing the research.

Thankfully, the other agency agreed to cooperate in recruiting by placing an announcement on the bulletin board and in its newsletter. However, they reversed their initial oral acquiescence and later refused to cooperate when the researcher asked the director to write an official letter for the Institutional Review Board (IRB) that the agency would cooperate with the researcher to recruit participants. They worried that their being involved in the research would violate the Health Insurance Portability and Accountability Act (HIPPA) rules. Enacted in 1996 and taking effect on 14 April 2003, the primary purpose of the HIPPA regulations is to protect unauthorized disclosure of individually identifiable health information. It requires the establishment of national standards for electronic health care transactions and national identifiers for providers, health plans, and employers (Department of Health and Human Services, 2009). The researcher's efforts to explain the HIPPA regulations consequently stirred up their unwillingness and reluctance to cooperate in any way.

Marshall and Rossman (2006: 78) pointed out that, 'the success of qualitative studies depends primarily on the interpersonal skills of the researcher'; this researcher felt that she had failed in the skills necessary to gain the willingness of community gatekeepers, the access to potential Korean-American participants. Developing good relationships with gatekeepers under the pressure of HIPPA regulations simply made research practice difficult. Similarly, other researchers have addressed their difficult experiences with the HIPPA and its impact on their research including implications for IRBs and recruitment of participants (Albert and Levine, 2005; Erlen, 2005). The experience of this author added one more procedural and ethical dilemma. What culturally sensitive recruiting approach could be taken that would prevent community agencies from worrying about the HIPPA Privacy Rule? In recruiting potential participants, what is an appropriate balance between being ethically and culturally

appropriate and being efficient at the same time? How can a researcher, especially a novice one, who has not developed a liaison with community leaders gain access to cultural-minority participants?

After discussing an efficacious and appropriate recruitment approach with the doctoral committee, the researcher used paid advertising in the local Korean-English language newspapers for the pilot recruitment. This method was chosen because using the media did not involve ethical concerns, at least with the HIPPA, and because the media has the public's confidence and represents a reliable authority to Korean-Americans. Moreover, a word-of-mouth effect could begin that would reach more potential participants than merely relying on the cooperation of the agencies. The first two individuals contacted were involved in the pilot interview exercise and were informed that their participation would be in a pilot study intended to guide a main body of research.

The pilot exercise was helpful in identifying research barriers and made use of a media path leading to effective recruiting methods for a main study. Experiences in the pilot raised the following concerns as well. The identifying of recruitment barriers in the pilot study may represent tensions between researchers and practitioners, at least in the social work field. It also highlighted the importance of researchers being familiar with both HIPPA regulations and their impact on social science and health-related research, and drew attention to the fact that the necessity of this familiarity has not been much discussed in spite of its evident impact on research. In light of the groundless fear that one agency manifested toward the possible violation of the HIPPA, a concern arises that the challenging recruiting process, including dealing with misunderstanding about the regulations, may make researchers reluctant to conduct research on minority populations.

Discussion 2: Engaging the Use of Oneself as a Researcher in a Culturally Appropriate Way and from a Phenomenological Perspective

As previously mentioned, two participants were recruited for this pilot exercise. One participant, named Park (a pseudonym), was a self-referral to the pilot made in response to a word-of-mouth referral by her church member. Park was in her mid-70s and was taking care of her Alzheimer's disease-stricken husband at their own home. Lee (a pseudonym), the other participant, became involved in this pilot after having been referred by her sister, a friend of this researcher, upon visiting her sibling for a respite from caregiving. This 39-year-old woman regarded herself as the primary caregiver to her mother-in-law, who began to show memory problems two years earlier.

Before beginning the pilot work, the major concern was about how to present oneself appropriately as a researcher. The cultural importance of showing respect and affection according to age is reflected in the Korean language by the use of differentiated terms of address. In oral communication,

honorific and polite responses to seniors usually include the Korean words 'grandfather' or 'grandmother'. In particular, by referring to participant Park as 'grandmother', the researcher was concerned that the interviewee might grow confused about the researcher's role and would consider her as a friendly granddaughter figure.

According to Hill (2006), considerations such as 'who do I (researcher) want to be?' and 'who do I want to be to them (participants)?' are must-ask questions in conducting qualitative research. Referring to her as Grandmother Park was culturally appropriate and in accord with the indigenous manner. By referring to her as 'grandmother', this researcher also attempted to represent herself as a learner who tried to be responsive to the participant.

Approaches to knowing in qualitative research must be guided by an ethic of caring in a culturally appropriate way, which requires continuous reflection about the role of the researcher. This self-reflection may enable qualitative researchers to recognize how they are positioned in relation to participants and how this shapes the research process (Hill, 2006).

Upon reflection, for some time in the beginning with Park, the researcher was preoccupied with the role of neutral researcher. Before long she realized that her detached attitude was hindering her from building rapport with this grandmother participant. Each stage in the interview has its own developmental task to accomplish before the researcher can go further. Because the researcher had to prioritize which steps should be first taken to make the interview progress, she assigned the need for rapport with the interviewee the highest priority. When Park asked the researcher questions like 'How old are you?' and 'Are you married?' – questions that are considered natural for an older person to ask a younger person in the Korean culture – the researcher answered them while trying to identify the purpose of the meeting in a non-threatening and approachable manner. She needed to educate the interviewee about the interviewer's role by asking and answering questions and redirecting these to a subject related to the interview questions, as Marshall and Rossman (2006) suggested.

Although engaging in chit-chat with Park may have had no bearing on the researcher's agenda for the visit, it not only allowed her to relate more easily to the grandmother participant, it also permitted an opportunity for her to display respect and affection for Park. The researcher had to be comfortable with presenting herself in a culturally appropriate way in order to facilitate trust and to further her purpose. Once this researcher felt comfortable, she noticed that the way Park sat and spoke changed too, for the interviewee looked comfortable as well. It was at this moment that the researcher was no longer a stranger, for a delicate moment of a transition from being an outsider to becoming an insider had occurred.

However, after reviewing transcriptions and hearing the audio-taped interview, this researcher realized she had presented herself as a clinical social

worker doing psychotherapy once the interview progressed. She noticed she had reframed what interviewees said and tried to emphasize what they were experiencing. Unless she tried hard to restrain her use of self in a therapeutic way, it seemed that her professional self as a clinical social worker was dominating the interview. Padgett (2008: 86) noted that qualitative researchers carry a number of identities – professional, personal, political – into the field and asserted, ‘how these identities influence the study is largely a matter of context and appropriateness’. However, it is important to recognize that the aims of research interviews differ from those of psychotherapy as Hutchinson and Wilson (1994) made clear. While therapy aims to facilitate a client’s growth and change, an in-depth interview in qualitative research seeks to develop knowledge. Therapeutic effects may exist in research interviews, but they are by-products (Lipson, 1984).

While conducting interviews, this researcher needed to strike a balance between being as culturally appropriate as possible, being non-judgmental, and being neutral. In order to conduct an in-depth interview, it was necessary to adapt the interviewing style and to remind herself consistently and consciously of her role of an inquirer from a phenomenological perspective. This point will be further addressed in the following discussion.

Discussion 3: Reflecting on the Importance of the Epoche Process and Its Difficulty in Conducting Phenomenological Inquiry

For qualitative researchers, inquiry starts with the following fundamental questions: ‘What are the phenomena that I am looking for?’ and ‘What ought I to do in order to apprehend the phenomena?’. How the researcher relates to the task of getting to know the phenomena is a crucial methodological and epistemological issue accompanying a significant application of results.

The transcendental, phenomenological approach stresses the centrality of epoche in the research process. Epoche is an ongoing assignment of primary significance for the researcher in phenomenological study. It refers to the disciplined and systematic effort to set aside or bracket prejudgments regarding the phenomenon being investigated in order to continue the study as free of pre-conceptions as possible and thereby to be as open and receptive as possible to listening to participants’ experiences (Moustakas, 1994). Although epoche is never fully achieved, the process is repeated again and again until the researcher reaches the internal readiness to enter the participant’s world freshly and come to know it as such. Moustakas (1994) suggested a reflective-meditative procedure to reach the internal peacefulness of epoche. Through the process of reflective meditation, which encourages an open perception of issues, the researcher becomes receptive to the participants with an unbiased looking (Moustakas, 1994). Even if researchers are engaged in epoche in order to examine their prejudices and to attempt to be as non-judgmental as possible, they should

recognize that any and all interpretation is founded on preconception. In other words, researchers' sociocultural backgrounds are always implicitly present and insinuate pre-understanding and bias into their analyses.

The use of self involved in conducting in-depth interviews raises obvious questions of possible bias. Particular types of accounts could be encouraged based on the interview protocol. Before coming to these particular interviews, this researcher had knowledge of the topic she was studying. She brought her hypothetic expectations of what participants would be going to discuss regarding their caregiving experiences. She had developed a picture of what their experiences might be like mainly through both literature review and working experience. As a researcher and an outsider-within (Collins, 1990), this researcher stands between the interviewees and the research community from which she comes and to which she reports the data. In other words, she translates the lived experience of participants into a researcher's language in the name of enhancing understanding, generating knowledge, and advocating for the participants. Being a social work researcher, she is ethically obligated to produce knowledge that empowers study populations (Gibbs, 2001), which requires insight into their experiences. However, there remains an unavoidable gap between what insiders truly experience and the researcher's reconstruction of that experience, no matter the degree of care with which the study may have been undertaken.

Furthermore, because researchers serve as main research instruments, how far they as ordinary people could affect the interview needs to be established. This reflection led to considering the necessity of deconstructing the researcher's knowledge base and common sense as well. She needs to hold a position of uncertainty in order to learn to identify where participants are psychologically. How does she maintain a position of uncertainty and build a collaborative process with interviewees? Conducting research while engaging the process of epoche by maintaining a position of uncertainty may be a process far too difficult for researchers. In order to remain mindful of the centrality of epoche in transcendental phenomenological research and to appreciate the researcher's role in a culturally competent way, this researcher used a journal log, the type of personal documents most recommended by Taylor and Bogdan (1984). She documented the ideas, thoughts, impressions, reflections, and feelings during the pilot study. Spradley (1979: 76) suggested the use of a personal log 'to enable a person to take into account personal biases and feelings, to understand their influence on research'. Lincoln and Guba (1985) also recommended the use of a log or reflexive journal to establish credibility, dependability, and confirmability in qualitative research. The reflexive journal helped this researcher negotiate an internal conflict, one in which both where the application of epoche seemed necessary and the bracketing of the existing experiential and theoretical knowledge seemed impossible. This separating of personal views and experiences from data collection was more challenging than anticipated and could be made easier

if peer reviewers or peer debriefers had assisted. According to Lincoln and Guba (1985: 308), a peer debriefer ‘assists the researcher to probe her biases, to explore alternate meanings, and to clarify possible biased interpretation’. Regular check-ups with peer reviewers were assigned for the main study in order to explore aspects of the inquiry that might otherwise remain only implicit in the researcher’s mind.

Discussion 4: Modifying Interview Questions

In this exploratory pilot work, the following research questions were designed to assess the nature of Korean-American family dementia caregiving while focusing on the experience of loss and grief: what is the caregiving experience among Korean-American family caregivers of elderly persons with dementia? More specifically, how do they experience loss because of the disease-associated changes they observe in their patients, and how do they react to such losses?

Two participants in this pilot study remarked that Alzheimer’s is a disease that results from a problem with the functioning of the brain. Once they noticed cognitive changes in their elderly family member, Park and Lee stated that they sought a formal diagnosis. This finding does not fully support previous studies that found that most Korean caregivers see Alzheimer’s disease as a normal consequence of getting old (Chee and Levkoff, 2001; Kim, 2002). They were actively involved in seeking medical attention. In terms of the research these caregiver participants actively participated in the interview. Obtaining consent forms and getting permission to tape-record went smoothly; this was contrary to the warning given by other researchers (e.g. Han et al., 2007; Kim et al., 2006; Marshall and Rossman, 2006; Yuen and Kauh, 2002).

However, Lee, a caregiver to her mother-in-law with dementia, commented that some of the interview questions were not relevant to her experience. She felt that she had to say what the interviewer wanted to hear since it was a formal interview. After reviewing the transcriptions, the researcher realized that she had kept asking probing questions until she got the answers she wanted. For example, the researcher had repeated the same question by amplifying her earlier statements in order for Lee to better understand the meaning of her questions about loss and grief. Participant Lee’s main objection toward the interview was the guided interview questions about the experience of loss and especially of grief while she was caregiving (refer to Table 1). Participant Park also raised similar concerns and mentioned that grieving was not particularly pertinent to what she had as yet felt in her caregiving experience.

The responses in the pilot interviews with Park and Lee helped the researcher to realize what her preconceptions and biases were toward dementia caregiving. Family caregivers often witness dramatic cognitive, behavioural, personal changes in the person with dementia. The changes result in ongoing

Table 1 SELECTED GUIDED INTERVIEW QUESTIONS

Interview Questions before Modification	Interview Questions after Modification
What have been the major losses?	What have been the major changes since caregiving?
What have been your reactions to the losses?	What have been your reactions to these changes?
Can you characterize your experience as a grief experience?	How have you dealt with these reactions?
What's your grief experience like?	Have your reactions changed over time?
How have your grief reactions changed over time?	

and ambivalent feelings of loss and grief to caregivers while they continue to meet objective demands of care (Boss, 2000; Sanders and Corley, 2003). The experience of loss and grief is a critical result of caring for patients with Alzheimer's disease. However, if the researcher had decided to explore the issue of loss and grief in particular, as intended, it might have led to either fragmented stories from the caregiver participants or to stories manipulated by the researcher.

Based on experiences from pilot interviews, the interview questions for the main study were modified to be broad enough for interviewees to narrate their experiences. The main modification was to remove the term grief from the interview protocol and to change the term loss to include any changes (see Table 1). Patton (1980) pointed out the importance of the language that participants use among themselves in talking about their experiences. As the main research tool, the researcher learns what questions to ask and how to ask interviewees (Taylor and Bogdan, 1984). The researcher asks questions that reflect one's area of interest and, therefore, these are likely to come more from one's own area of interest than from what the participant has said. However, interviewers must try to avoid imposing their own interests on the experience of the participants (Seidman, 1998). Clearly, the phenomenological interview should not inform participants of what the researcher wants to hear, which might not capture the whole experience. Rather, it should allow the interviewees to reflect the nature and essence of those experiences related to the interview topic.

Faced with challenges of developing scientific knowledge, researchers can use qualitative inquiries to explore areas of concern from an emic perspective. Maxwell (1996) insisted that pilot studies can be useful in qualitative research,

especially for the purpose of generating an understanding of concepts held by research participants. This pilot work caused the researcher to be aware of diversities in the construction and meaning-making of certain concepts, even when the researcher and interviewees share the same ethnic background and speak the same language (Tsai et al., 2004).

CONCLUSION

Seidman (1998) suggested that researchers build a pilot venture to test their research design in order to gauge their own ability to conduct studies and to come to terms with practicalities. This article provided opportunities to explore specific feasibility and methodological issues related to the process of conducting phenomenological research. Through the pilot exercise, a culturally competent, ethical, and efficient way of recruiting Korean-American participants was identified. It provided crucial reflections on the use of oneself as a researcher in a culturally appropriate way and from a phenomenological perspective in the interview process. Discovering how difficult it was to achieve *epoche* and reconsidering its inherent limitations were also made possible through the exercise. It highlighted the central necessity of keeping a reflexive journal and, further, to obtain assistance from peer debriefers when conducting phenomenological research. Receiving feedback from the participants in the pilot and reading transcriptions helped in the modifying of interview questions for the main study, and this in turn served to improve the practicability of the interview protocol. Although the useful functions of pilot studies in qualitative inquiry had been identified earlier, an additional advantage of implementing a pilot study was determined through this research: that conducting a pilot study with clear aims and objectives would promote the rigor and trustworthiness of qualitative research.

Although these specific lessons learned from this pilot study may not apply to other research, sharing the reflexive accounts in the pilot exercise may inform researchers of the methodological problems typically experienced when carrying out this type of research. The discussion of the issues and lessons from the pilot study is closed by offering a recommendation to those who intend to conduct qualitative research in culturally competent ways.

Researchers may begin research by addressing an important but often-overlooked question: how the research topic would be received by participants involved. For example, when conducting qualitative studies on caregiving for dementia, it is important to carefully assess the local construction of dementia, which may vary, and its impact on the research process, including recruitment (Hinton et al., 2000). By accepting that their patient had a disease, participants in this pilot study were neither shamed nor stigmatized when talking about their elderly patient's cognitive changes. If their perception of dementia were

either as a natural part of ageing or as mental disorder, it might have been more difficult to recruit them for the pilot interview. Along with incorporating local understanding of dementia, researchers should develop a flexible and culturally appropriate approach toward engaging potential participants and designing their studies. This effort may not only enhance participation by minority families in dementia caregiving research, but also facilitate their voices being heard, which is the first step to their empowerment.

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