

INTRODUCTION

The Discipline and Practice of Qualitative Research

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The global community of qualitative researchers is midway between two extremes, searching for a new middle, moving in several different directions at the same time.¹ Mixed methodologies and calls for scientifically based research, on the one side, renewed calls for social justice inquiry from the critical social science tradition on the other. In the methodological struggles of the 1970s and 1980s, the very existence of qualitative research was at issue. In the new paradigm war, “every overtly social justice-oriented approach to research . . . is threatened with de-legitimization by the government-sanctioned, exclusivist assertion of positivism . . . as the ‘gold standard’ of educational research” (Wright, 2006, pp. 799–800).

The evidence-based research movement, with its fixed standards and guidelines for conducting and evaluating qualitative inquiry, sought total domination: one shoe fits all (Cannella & Lincoln, Chapter 5, this volume; Lincoln, 2010). The heart of the matter turns on issues surrounding the politics and ethics of evidence and the value of qualitative work in addressing matters of equity and social justice (Torrance, Chapter 34, this volume).

In this introductory chapter, we define the field of qualitative research, then navigate, chart, and review the history of qualitative research in the human disciplines. This will allow us to locate this handbook and its contents within their historical moments. (These historical moments are somewhat artificial; they are socially constructed, quasi-historical, and overlapping conventions. Nevertheless, they permit a “performance” of developing ideas. They also facilitate an increasing sensitivity to and sophistication about the pitfalls and promises of ethnography and qualitative research.) A conceptual framework for reading the qualitative research act as a multicultural, gendered process is presented.

We then provide a brief introduction to the chapters, concluding with a brief discussion of qualitative research. We will also discuss the threats to qualitative human-subject research from the methodological conservatism movement, which was noted in our Preface. As indicated there, we use the metaphor of the bridge to structure what follows. This volume provides a bridge between historical moments, politics, the decolonization project, research methods, paradigms, and communities of interpretive scholars.

▣ HISTORY, POLITICS, AND PARADIGMS

To better understand where we are today and to better grasp current criticisms, it is useful to return to the so-called paradigm wars of the 1980s, which resulted in the serious crippling of quantitative research in education. Critical pedagogy, critical theorists, and feminist analyses fostered struggles to acquire power and cultural capital for the poor, non-whites, women, and gays (Gage, 1989).

Charles Teddlie and Abbas Tashakkori’s history is helpful here. They expand the time frame of the 1980s war to embrace at least three paradigm wars, or periods of conflict: the postpositivist-constructivist war against positivism (1970–1990); the conflict between competing postpositivist, constructivist, and critical theory paradigms (1990–2005); and the current conflict between evidence-based methodologists and the mixed methods, interpretive, and critical theory schools (2005–present).²

Egon Guba’s (1990a) *The Paradigm Dialog* signaled an end to the 1980s wars. Postpositivists, constructivists, and critical theorists talked to one another, working through issues connected to ethics, field studies, praxis, criteria, knowledge accumulation,

truth, significance, graduate training, values, and politics. By the early 1990s, there was an explosion of published work on qualitative research; handbooks and new journals appeared. Special interest groups committed to particular paradigms appeared, some with their own journals.³

The second paradigm conflict occurred within the mixed methods community and involved disputes “between individuals convinced of the ‘paradigm purity’ of their own position” (Teddlie & Tashakkori, 2003b, p. 7). Purists extended and repeated the argument that quantitative and qualitative methods and postpositivism and the other “isms” cannot be combined because of the differences between their underlying paradigm assumptions. On the methodological front, the incompatibility thesis was challenged by those who invoked triangulation as a way of combining multiple methods to study the same phenomenon (Teddlie & Tashakkori, 2003a, p. 7). This ushered in a new round of arguments and debates over paradigm superiority.

A soft, apolitical pragmatic paradigm emerged in the post-1990 period. Suddenly, quantitative and qualitative methods became compatible, and researchers could use both in their empirical inquiries (Teddlie & Tashakkori, 2003a, p. 7). Proponents made appeals to a “what works” pragmatic argument, contending that “no incompatibility between quantitative and qualitative methods exists at either the level of practice or that of epistemology . . . there are thus no good reasons for educational researchers to fear forging ahead with ‘what works’” (Howe, 1988, p. 16). Of course, what works is more than an empirical question. It involves the politics of evidence.

This is the space that evidence-based research entered. It became the battleground of the third war, “the current upheaval and argument about ‘scientific’ research in the scholarly world of education” (Clark & Scheurich, 2008; Scheurich & Clark, 2006, p. 401). Enter Teddlie and Tashakkori’s third moment: Mixed methods and evidence-based inquiry meet one another in a soft center. C. Wright Mills (1959) would say this is a space for abstracted empiricism. Inquiry is cut off from politics. Biography and history recede into the background. Technological rationality prevails.

Resistances to Qualitative Studies

The academic and disciplinary resistances to qualitative research illustrate the politics embedded in this field of discourse. The challenges to qualitative research are many. To better understand these criticisms, it is necessary to “distinguish analytically the political (or external) role of [qualitative] methodology from the procedural (or internal) one” (Seale, Gobo, Gubrium, & Silverman, 2004, p. 7). Politics situate methodology within and outside the academy. Procedural issues define how qualitative methodology is used to produce knowledge about the world (Seale et al., 2004, p. 7).

Often, the political and the procedural intersect. Politicians and hard scientists call qualitative researchers *journalists* or “soft” scientists. Their work is termed unscientific, only exploratory, or subjective. It is called criticism and not theory, or it is interpreted politically, as a disguised version of Marxism or secular humanism (see Huber, 1995; also Denzin, 1997, pp. 258–261).

These political and procedural resistances reflect an uneasy awareness that the interpretive traditions of qualitative research commit one to a critique of the positivist or post-positivist project. But the positivist resistance to qualitative research goes beyond the “ever-present desire to maintain a distinction between hard science and soft scholarship” (Carey, 1989, p. 99). The experimental (positivist) sciences (physics, chemistry, economics, and psychology, for example) are often seen as the crowning achievements of Western civilization, and in their practices, it is assumed that “truth” can transcend opinion and personal bias (Carey, 1989, p. 99; Schwandt, 1997b, p. 309). Qualitative research is seen as an assault on this tradition, whose adherents often retreat into a “value-free objectivist science” (Carey, 1989, p. 104) model to defend their position. The positivists seldom attempt to make explicit, and critique the “moral and political commitments in their own contingent work” (Carey, 1989, p. 104; Lincoln, Lynham, & Guba, Chapter 6, this volume).

Positivists further allege that the so-called new experimental qualitative researchers write fiction, not science, and have no way of verifying their truth statements. Ethnographic poetry and fiction signal the death of empirical science, and there is little to be gained by attempting to engage in moral criticism. These critics presume a stable, unchanging reality that can be studied with the empirical methods of objective social science (see Huber, 1995). The province of qualitative research, accordingly, is the world of lived experience, for this is where individual belief and action intersect with culture. Under this model, there is no preoccupation with discourse and method as material interpretive practices that constitute representation and description. This is the textual, narrative turn rejected by the positivists.

The opposition to positive science by the poststructuralists is seen, then, as an attack on reason and truth. At the same time, the positivist science attack on qualitative research is regarded as an attempt to legislate one version of truth over another.

The Legacies of Scientific Research

Writing about scientific research, including qualitative research, from the vantage point of the colonized, a position that she chooses to privilege, Linda Tuhiwai Smith states that “the term ‘research’ is inextricably linked to European imperialism and colonialism.” She continues, “the word itself is probably one of the dirtiest words in the indigenous world’s vocabulary . . .

It is “implicated in the worst excesses of colonialism” (p. 1), with the ways in which “knowledge about indigenous peoples was collected, classified, and then represented back to the West” (Smith, 1999, p. 1). This dirty word stirs up anger, silence, distrust. “It is so powerful that indigenous people even write poetry about research” (Smith, 1999, p. 1). It is one of colonialism’s most sordid legacies, she says.

Frederick Erickson’s Chapter 3 of this volume charts many key features of this painful history. He notes with some irony that qualitative research in sociology and anthropology was born out of concern to understand the exotic, often dark-skinned “other.” Of course, there were colonialists long before there were anthropologists and ethnographers. Nonetheless, there would be no colonial—and now no neo-colonial—history, were it not for this investigative mentality that turned the dark-skinned other into the object of the ethnographer’s gaze. From the very beginning, qualitative research was implicated in a racist project.⁴

■ DEFINITIONAL ISSUES

Qualitative research is a field of inquiry in its own right. It crosscuts disciplines, fields, and subject matter.⁵ A complex, interconnected family of terms, concepts, and assumptions surrounds the term. These include the traditions associated with foundationalism, positivism, postfoundationalism, postpositivism, poststructuralism, postmodernism, post-humanism, and the many qualitative research perspectives and methods connected to cultural and interpretive studies (the chapters in Part II of this volume take up these paradigms).⁶ There are separate and detailed literatures on the many methods and approaches that fall under the category of qualitative research, such as case study, politics and ethics, participatory inquiry, interviewing, participant observation, visual methods, and interpretive analysis.

In North America, qualitative research operates in a complex historical field that crosscuts at least eight historical moments. These moments overlap and simultaneously operate in the present.⁷ We define them as the traditional (1900–1950), the modernist or golden age (1950–1970), blurred genres (1970–1986), the crisis of representation (1986–1990), the postmodern, a period of experimental and new ethnographies (1990–1995), postexperimental inquiry (1995–2000), the methodologically contested present (2000–2010), and the future (2010–), which is now. The future, the eighth moment, confronts the methodological backlash associated with the evidence-based social movement. It is concerned with moral discourse, with the development of sacred textualities. The eighth moment asks that the social sciences and the humanities become sites for critical conversations about democracy, race, gender, class, nation-states, globalization, freedom, and community.⁸

The postmodern and postexperimental moments were defined in part by a concern for literary and rhetorical tropes and the narrative turn, a concern for storytelling, for composing ethnographies in new ways (Ellis, 2009; and in this volume, Hamera, Chapter 18; Tedlock, Chapter 19; Spry, Chapter 30; Ellingson, Chapter 36; St.Pierre, Chapter 37; and Pelias, Chapter 40).

Successive waves of epistemological theorizing move across these eight moments. The traditional period is associated with the positivist, foundational paradigm. The modernist or golden age and blurred genres moments are connected to the appearance of postpositivist arguments. At the same time, a variety of new interpretive, qualitative perspectives were taken up, including hermeneutics, structuralism, semiotics, phenomenology, cultural studies, and feminism.⁹ In the blurred genre phase, the humanities became central resources for critical, interpretive theory and the qualitative research project broadly conceived. The researcher became a *bricoleur* (as discussed later), learning how to borrow from many different disciplines.

The blurred genres phase produced the next stage, the crisis of representation. Here researchers struggled with how to locate themselves and their subjects in reflexive texts. A kind of methodological diaspora took place, a two-way exodus. Humanists migrated to the social sciences, searching for new social theory and new ways to study popular culture and its local ethnographic contexts. Social scientists turned to the humanities, hoping to learn how to do complex structural and poststructural readings of social texts. From the humanities, social scientists also learned how to produce texts that refused to be read in simplistic, linear, incontrovertible terms. The line between a text and a context blurred. In the postmodern experimental moment, researchers continued to move away from foundational and quasifoundational criteria (in this volume, see Altheide & Johnson, Chapter 35; St.Pierre, Chapter 37). Alternative evaluative criteria were sought, ones that might prove evocative, moral, critical, and rooted in local understandings.

Any definition of qualitative research must work within this complex historical field. Qualitative research means different things in each of these moments. Nonetheless, an initial, generic definition can be offered. *Qualitative research* is a situated activity that locates the observer in the world. Qualitative research consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations, including fieldnotes, interviews, conversations, photographs, recordings, and memos to the self. At this level, qualitative research involves an interpretive, naturalistic approach to the world. This means that qualitative researchers study things in their natural settings, attempting to make sense of or interpret phenomena in terms of the meanings people bring to them.¹⁰

Qualitative research involves the studied use and collection of a variety of empirical materials—case study, personal

experience, introspection, life story, interview, artifacts, and cultural texts and productions, along with observational, historical, interactional, and visual texts—that describe routine and problematic moments and meanings in individuals' lives. Accordingly, qualitative researchers deploy a wide-range of interconnected interpretive practices, hoping always to get a better understanding of the subject matter at hand. It is understood, however, that each practice makes the world visible in a different way. Hence, there is frequently a commitment to using more than one interpretive practice in any study.

■ THE QUALITATIVE RESEARCHER-AS-BRICOLEUR AND QUILT MAKER

Multiple gendered images may be brought to the qualitative researcher: scientist, naturalist, fieldworker, journalist, social critic, artist, performer, jazz musician, filmmaker, quilt maker, essayist. The many methodological practices of qualitative research may be viewed as soft science, journalism, ethnography, *bricolage*, quilt making, or montage. The researcher, in turn, may be seen as a *bricoleur*, as a maker of quilts, or in filmmaking, a person who assembles images into montages (on montage, see Cook, 1981, pp. 171–177; Monaco, 1981, pp. 322–328; and discussion below; on quilting, see hooks, 1990, pp. 115–122; Wolcott, 1995, pp. 31–33).

Douglas Harper (1987, pp. 9, 74–75, 92); Michel de Certeau (1984, p. xv); Cary Nelson, Paula A. Treichler, and Lawrence Grossberg (1992, p. 2); Claude Lévi-Strauss (1962/1966, p. 17); Deena and Michael Weinstein (1991, p. 161); and Joe L. Kincheloe (2001) clarify the meaning of *bricolage* and *bricoleur*.¹¹ A *bricoleur* makes do by “adapting the bricoles of the world. *Bricolage* is ‘the poetic making do’” (de Certeau, 1984, p. xv), with “such bricoles—the odds and ends, the bits left over” (Harper, 1987, p. 74). The *bricoleur* is a “Jack of all trades, a kind of professional do-it-yourself[er]” (Lévi-Strauss, 1962/1966, p. 17). In Harper’s (1987) work, the *bricoleur* defines herself and extends herself (p. 75). Indeed, her life story, her biography, “may be thought of as *bricolage*” (Harper, 1987, p. 92).

There are many kinds of *bricoleurs*—interpretive, narrative, theoretical, political. The interpretive *bricoleur* produces a *bricolage*; that is, a pieced-together set of representations that are fitted to the specifics of a complex situation. “The solution (*bricolage*) which is the result of the *bricoleur*’s method is an [emergent] construction” (Weinstein & Weinstein, 1991, p. 161), which changes and takes new forms as different tools, methods, and techniques of representation and interpretation are added to the puzzle. Nelson et al. (1992) describe the methodology of cultural studies “as a *bricolage*. Its choice of practice, that is, is pragmatic, strategic, and self-reflexive” (p. 2). This understanding can be applied, with qualifications, to qualitative research.

The qualitative-researcher-as-bricoleur or a maker of quilts uses the aesthetic and material tools of his or her craft, deploying whatever strategies, methods, or empirical materials are at hand (Becker, 1998, p. 2). If new tools or techniques have to be invented or pieced together, then the researcher will do this. The choice of which interpretive practices to employ is not necessarily set in advance. The “choice of research practices depends upon the questions that are asked, and the questions depend on their context” (Nelson et al., 1992, p. 2), what is available in the context, and what the researcher can do in that setting.

These interpretive practices involve aesthetic issues, an aesthetics of representation that goes beyond the pragmatic or the practical. Here the concept of *montage* is useful (see Cook, 1981, p. 323; Monaco, 1981, pp. 171–172). *Montage* is a method of editing cinematic images. In the history of cinematography, *montage* is associated with the work of Sergei Eisenstein, especially his film, *The Battleship Potemkin* (1925). In *montage*, a picture is made by superimposing several different images on one another. In a sense, *montage* is like *pentimento*, where something painted out of a picture (an image the painter “repented,” or denied) now becomes visible again, creating something new. What is new is what had been obscured by a previous image.

Montage and *pentimento*, like jazz, which is improvisation, create the sense that images, sounds, and understandings are blending together, overlapping, and forming a composite, a new creation. The images seem to shape and define one another; an emotional gestalt effect is produced. Often, these images are combined in a swiftly run sequence. When done, this produces a dizzily revolving collection of several images around a central or focused picture or sequence; such effects signify the passage of time.

Perhaps the most famous instance of *montage* is given in the Odessa Steps sequence in *The Battleship Potemkin*.¹² In the climax of the film, the citizens of Odessa are being massacred by tsarist troops on the stone steps leading down to the city’s harbor. Eisenstein cuts to a young mother as she pushes her baby’s carriage across the landing in front of the firing troops. Citizens rush past her, jolting the carriage, which she is afraid to push down to the next flight of stairs. The troops are above her firing at the citizens. She is trapped between the troops and the steps. She screams. A line of rifles pointing to the sky erupts in smoke. The mother’s head sways back. The wheels of the carriage teeter on the edge of the steps. The mother’s hand clutches the silver buckle of her belt. Below her, people are being beaten by soldiers. Blood drips over the mother’s white gloves. The baby’s hand reaches out of the carriage. The mother sways back and forth. The troops advance. The mother falls back against the carriage. A woman watches in horror as the rear wheels of the carriage roll off the edge of the landing. With accelerating speed, the carriage bounces down the steps, past the dead citizens. The baby is jostled from side to side inside the carriage. The soldiers

fire their rifles into a group of wounded citizens. A student screams, as the carriage leaps across the steps, tilts, and overturns (Cook, 1981, p. 167).¹³

Montage uses sparse images to create a clearly defined sense of urgency and complexity. Montage invites viewers to construct interpretations that build on one another as a scene unfolds. These interpretations are built on associations based on the contrasting images that blend into one another. The underlying assumption of montage is that viewers perceive and interpret the shots in a “montage sequence not *sequentially*, or one at a time, but rather *simultaneously*” (Cook, 1981, p. 172, italics in original). The viewer puts the sequences together into a meaningful emotional whole, as if at a glance, all at once.

The qualitative researcher who uses montage is like a quilt maker or a jazz improviser. The quilter stitches, edits, and puts slices of reality together. This process creates and brings psychological and emotional unity to an interpretive experience. There are many examples of montage in current qualitative research. Using multiple voices and different textual formations, voices, and narrative styles, Marcelo Diversi and Claudio Moreira (2009) weave a complex text about race, identity, nation, class, sexuality, intimacy, and family. As in quilt making and jazz improvisation, many different things are going on at the same time: different voices, different perspectives, points of views, angles of vision. Autoethnographic performance texts use montage simultaneously to create and enact moral meaning. They move from the personal to the political, the local to the historical and the cultural. These are dialogical texts. They presume an active audience. They create spaces for give and take between reader and writer. They do more than turn the other into the object of the social science gaze (in this volume, see Spry, Chapter 30; Pelias, Chapter 40).

Of course, qualitative research is inherently multimethod in focus (Flick, 2002, pp. 226–227; 2007). However, the use of multiple methods, or triangulation, reflects an attempt to secure an in-depth understanding of the phenomenon in question. Objective reality can never be captured. We know a thing only through its representations. Triangulation is not a tool or a strategy of validation but an alternative to validation (Flick, 2002, p. 227; 2007). The combination of multiple methodological practices, empirical materials, perspectives, and observers in a single study is best understood, then, as a strategy that adds rigor, breadth complexity, richness, and depth to any inquiry (see Flick, 2002, p. 229; 2007, pp. 102–104).

Laura L. Ellingson (Chapter 36, this volume; also 2009) disputes a narrow conception of triangulation, endorsing instead a postmodern form (2009, p. 190). It asserts that the central image for qualitative inquiry is the crystal—multiple lenses—not the triangle. She sees crystallization as embodying an energizing, unruly discourse, drawing raw energy from artful science and scientific artwork (p. 190). Mixed-genre texts in the postexperimental moment have more than three sides.

Like crystals, Eisenstein’s montage, the jazz solo, or the pieces in a quilt, the mixed-genre text combines “symmetry and substance with an infinite variety of shapes, substances, transmutations . . . crystals grow, change, alter . . . crystals are prisms that reflect externalities and refract within themselves, creating different colors, patterns, arrays, casting off in different directions” (Richardson, 2000, p. 934).

In the crystallization process, the writer tells the same tale from different points of view. Crystallized projects mix genres and writing formats, offering partial, situated, open-ended conclusions. In *Fires in the Mirror* (1993) Anna Deavere Smith presents a series of performance pieces based on interviews with people involved in a racial conflict in Crown Heights, Brooklyn, on August 19, 1991. Her play has multiple speaking parts, including conversations with gang members, the police, and anonymous young girls and boys. There is no correct telling of this event. Each telling, like light hitting a crystal, gives a different reflection of the racial incident.

Viewed as a crystalline form, as a montage, or as a creative performance around a central theme, triangulation as a form of, or alternative to, validity thus can be extended. Triangulation is the display of multiple, refracted realities simultaneously. Each of the metaphors “works” to create simultaneity rather than the sequential or linear. Readers and audiences are then invited to explore competing visions of the context, to become immersed in and merge with new realities to comprehend.

The methodological bricoleur is adept at performing a large number of diverse tasks, ranging from interviewing to intensive self-reflection and introspection. The theoretical bricoleur reads widely and is knowledgeable about the many interpretive paradigms (feminism, Marxism, cultural studies, constructivism, queer theory) that can be brought to any particular problem. He or she may not, however, feel that paradigms can be mingled or synthesized. If paradigms are overarching philosophical systems denoting particular ontologies, epistemologies, and methodologies, one cannot move easily from one to the other. Paradigms represent belief systems that attach the user to a particular worldview. Perspectives, in contrast, are less well developed systems, and it can be easier to move between them. The researcher-as-bricoleur-theorist works between and within competing and overlapping perspectives and paradigms.

The interpretive bricoleur understands that research is an interactive process shaped by one’s personal history, biography, gender, social class, race, and ethnicity and those of the people in the setting. Critical bricoleurs stress the dialectical and hermeneutic nature of interdisciplinary inquiry, knowing that the boundaries between traditional disciplines no longer hold (Kincheloe, 2001, p. 683). The political bricoleur knows that science is power, for all research findings have political implications. There is no value-free science. A civic social science based on a politics of hope is sought (Lincoln, 1999). The gendered, narrative bricoleur also knows that researchers all tell stories

about the worlds they have studied. Thus, the narratives or stories scientists tell are accounts couched and framed within specific storytelling traditions, often defined as paradigms (e.g., positivism, postpositivism, constructivism).

The product of the interpretive bricoleur's labor is a complex, quilt-like bricolage, a reflexive collage or montage; a set of fluid, interconnected images and representations. This interpretive structure is like a quilt, a performance text, or a sequence of representations connecting the parts to the whole.

■ QUALITATIVE RESEARCH AS A SITE OF MULTIPLE INTERPRETIVE PRACTICES

Qualitative research, as a set of interpretive activities, privileges no single methodological practice over another. As a site of discussion or discourse, qualitative research is difficult to define clearly. It has no theory or paradigm that is distinctly its own. As Part II of this volume reveals, multiple theoretical paradigms claim use of qualitative research methods and strategies, from constructivism to cultural studies, feminism, Marxism, and ethnic models of study. Qualitative research is used in many separate disciplines, as we will discuss below. It does not belong to a single discipline.

Nor does qualitative research have a distinct set of methods or practices that are entirely its own. Qualitative researchers use semiotics, narrative, content, discourse, archival, and phonemic analysis—even statistics, tables, graphs, and numbers. They also draw on and use the approaches, methods, and techniques of ethnomethodology, phenomenology, hermeneutics, feminism, rhizomatics, deconstructionism, ethnographies, interviews, psychoanalysis, cultural studies, survey research, and participant observation, among others.¹⁴ All of these research practices “can provide important insights and knowledge” (Nelson et al., 1992, p. 2). No specific method or practice can be privileged over another.

Many of these methods or research practices are used in other contexts in the human disciplines. Each bears the traces of its own disciplinary history. Thus, there is an extensive history of the uses and meanings of ethnography and ethnology in education (Erickson, Chapter 3, this volume); of participant observation and ethnography in anthropology (Tedlock, Chapter 19, this volume); sociology (Holstein & Gubrium, Chapter 20, this volume); communications (in this volume, Hamera, Chapter 18; Spry, Chapter 30); cultural studies (Giardina & Newman, Chapter 10, this volume); textual, hermeneutic, feminist, psychoanalytic, arts-based, semiotic, and narrative analysis in cinema and literary studies (in this volume, Olesen, Chapter 7; Chase, Chapter 25; Finley, Chapter 26); and narrative, discourse, and conversational analysis in sociology, medicine, communications, and education (in this volume, Chase, Chapter 25; Peräkylä & Ruusuvuori, Chapter 32).

The many histories that surround each method or research strategy reveal how multiple uses and meanings are brought to each practice. Textual analyses in literary studies, for example, often treat texts as self-contained systems. On the other hand, a cultural studies or feminist perspective reads a text in terms of its location within a historical moment marked by a particular gender, race, or class ideology. A cultural studies use of ethnography would bring a set of understandings from feminism, postmodernism, and poststructuralism to the project. These understandings would not be shared by mainstream postpositivist sociologists. Similarly, postpositivist and poststructural historians bring different understandings and uses to the methods and findings of historical research. These tensions and contradictions are evident in many of the chapters in this handbook.

These separate and multiple uses and meanings of the methods of qualitative research make it difficult to agree on any essential definition of the field, for it is never just one thing.¹⁵ Still, a definition must be made. We borrow from and paraphrase Nelson et al.'s (1992, p. 4) attempt to define cultural studies:

Qualitative research is an interdisciplinary, transdisciplinary, and sometimes counterdisciplinary field. It crosscuts the humanities, as well as the social and the physical sciences. Qualitative research is many things at the same time. It is multiparadigmatic in focus. Its practitioners are sensitive to the value of the multimethod approach. They are committed to the naturalistic perspective and to the interpretive understanding of human experience. At the same time, the field is inherently political and shaped by multiple ethical and political positions.

Qualitative research embraces two tensions at the same time. On the one hand, it is drawn to a broad, interpretive, postexperimental, postmodern, feminist, and critical sensibility. On the other hand, it is drawn to more narrowly defined positivist, postpositivist, humanistic, and naturalistic conceptions of human experience and its analysis. Furthermore, these tensions can be combined in the same project, bringing both postmodern and naturalistic, or both critical and humanistic, perspectives to bear.

This rather awkward statement means that qualitative research is a set of complex interpretive practices. As a constantly shifting historical formation, it embraces tensions and contradictions, including disputes over its methods and the forms its findings and interpretations take. The field sprawls between and crosscuts all of the human disciplines, even including, in some cases, the physical sciences. Its practitioners are variously committed to modern, postmodern, and postexperimental sensibilities and the approaches to social research that these sensibilities imply.

Politics and Reemergent Scientism

In the first decade of this new century, the scientifically based research movement (SBR) initiated by the National Research

Council (NRC) created a new and hostile political environment for qualitative research (Howe, 2009). Connected to the No Child Left Behind Act of 2001 (NCLB), SBR embodied a reemergent scientism (Maxwell, 2004), a positivist evidence-based epistemology. Researchers are encouraged to employ “rigorous, systematic, and objective methodology to obtain reliable and valid knowledge” (Ryan & Hood, 2004, p. 80). The preferred methodology has well-defined causal models using independent and dependent variables. Causal models are examined in the context of randomized controlled experiments, which allow replication and generalization (Ryan & Hood, 2004, p. 81).

Under this framework, qualitative research becomes suspect. There are no well-defined variables or causal models. Observations and measurements are not based on random assignment to experimental groups. Hard evidence is not generated by these methods. At best, case study, interview, and ethnographic methods offer descriptive materials that can be tested with experimental methods. The epistemologies of critical race, queer, postcolonial, feminist, and postmodern theories are rendered useless, relegated at best to the category of scholarship, not science (Ryan & Hood, 2004, p. 81; St. Pierre & Roulston, 2006, p. 132).

Critics of the evidence movement are united on the following points. The movement endorses a narrow view of science (Lather, 2004; Maxwell, 2004), celebrating a “neoclassical experimentalism that is a throwback to the Campbell-Stanley era and its dogmatic adherence to an exclusive reliance on quantitative methods” (Howe, 2004, p. 42). There is “nostalgia for a simple and ordered universe of science that never was” (Popkewitz, 2004, p. 62). With its emphasis on only one form of scientific rigor, the NRC ignores the need for and value of complex historical, contextual, and political criteria for evaluating inquiry (Bloch, 2004).

Neoclassical experimentalists extol evidence-based “medical research as the model for educational research, particularly the random clinical trial” (Howe, 2004, p. 48). But the random clinical trial—dispensing a pill—is quite unlike “dispensing a curriculum” (Howe, 2004, p. 48), nor can the “effects” of the educational experiment be easily measured, unlike a “10-point reduction in diastolic blood pressure” (Howe, 2004, p. 48).

Qualitative researchers must learn to think outside the box as they critique the NRC and its methodological guidelines (Atkinson, 2004). We must apply our critical imaginations to the meaning of such terms as *randomized design*, *causal model*, *policy studies*, and *public science* (Cannella & Lincoln, 2004; Weinstein, 2004). At a deeper level, we must resist conservative attempts to discredit qualitative inquiry by placing it back inside the box of positivism.

Contesting Mixed Methods Experimentalism

Kenneth R. Howe (2004) observes that the NRC finds a place for qualitative methods in mixed methods experimental

designs. In such designs, qualitative methods may be “employed either singly or in combination with quantitative methods, including the use of randomized experimental designs” (Howe, 2004, p. 49; also Clark & Creswell, 2008; Hesse-Biber & Leavy, 2008). Clark, Creswell, Green, and Shope (2008) define mixed methods research “as a design for collecting, analyzing, and mixing both quantitative and qualitative data in a study in order to understand a research problem” (p. 364).¹⁶ Mixed methods are direct descendants of classical experimentalism and the triangulation movement of the 1970s (Denzin, 1989b). They presume a methodological hierarchy, with quantitative methods at the top, relegating qualitative methods to “a largely auxiliary role in pursuit of the *technocratic* aim of accumulating knowledge of ‘what works’” (Howe, 2004, pp. 53–54).

The *incompatibility thesis* disputes the key claim of the mixed methods movement, namely that methods and perspectives can be combined. Recalling the paradigm wars of the 1980s, this thesis argues that “compatibility between quantitative and qualitative methods is impossible due to incompatibility of the paradigms that underlie the methods” (Teddlie & Tashakkori 2003a, pp. 14–15; 2003b). Others disagree with this conclusion, and some contend that the incompatibility thesis has been largely discredited because researchers have demonstrated that it is possible to successfully use a mixed methods approach.

There are several schools of thought on this thesis, including the four identified by Teddlie and Tashakkori (2003a); that is, the complementary, single paradigm, dialectical, and multiple paradigm models. There is by no means consensus on these issues. Morse and Niehaus (2009) warn that ad hoc mixing of methods can be a serious threat to validity. Pragmatists and transformative emancipatory action researchers posit a dialectical model, working back and forth between a variety of tension points, such as etic–emic, value neutrality–value committed. Others (Guba & Lincoln, 2005; Lather, 1993) deconstruct validity as an operative term. Sharlene Nagy Hesse-Biber and Patricia Leavy’s (2008) emphasis on emergent methods pushes and blurs the methodological boundaries between quantitative and qualitative methods.¹⁷ Their model seeks to recover subjugated knowledges hidden from everyday view.

The traditional mixed methods movement takes qualitative methods out of their natural home, which is within the critical interpretive framework (Howe, 2004, p. 54; but see Teddlie and Tashakkori, 2003a, p. 15; also Chapter 16 in this volume). It divides inquiry into dichotomous categories, exploration versus confirmation. Qualitative work is assigned to the first category, quantitative research to the second (Teddlie & Tashakkori, 2003a, p. 15). Like the classic experimental model, this movement excludes stakeholders from dialogue and active participation in the research process. Doing so weakens its democratic and dialogical dimensions and decreases the likelihood that previously silenced voices will be heard (Howe, 2004, pp. 56–57).

Howe (2004) cautions that it is not just

[the] “methodological fundamentalists” who have bought into [this] approach. A sizeable number of rather influential . . . educational researchers . . . have also signed on. This might be a compromise to the current political climate; it might be a backlash against the perceived excesses of postmodernism; it might be both. It is an ominous development, whatever the explanation. (p. 57; also 2009, p. 438; Lincoln, 2010, p. 7)

The hybrid dialogical model, in contrast, directly confronts these criticisms.

The Pragmatic Criticisms of Anti-Foundationalism

Clive Seale et al. (2004) contest what they regard as the excesses of an antimethodological, “anything goes,” romantic postmodernism that is associated with our project. They assert that too often the approach we value produces “low quality qualitative research and research results that are quite stereotypical and close to common sense” (p. 2). In contrast they propose a practice-based, pragmatic approach that places research practice at the center. Research involves an engagement “with a variety of things and people: research materials . . . social theories, philosophical debates, values, methods, tests . . . research participants” (p. 2). (Actually this approach is quite close to our own, especially our view of the bricoleur and bricolage).

Their situated methodology rejects the antifoundational claim that there are only partial truths, that the dividing line between fact and fiction has broken down (Seale et al., 2004, p. 3). They believe that this dividing line has not collapsed and that we should not accept stories if they do not accord with the best available facts (p. 6). Oddly, these pragmatic procedural arguments reproduce a variant of the evidence-based model and its criticisms of poststructural performative sensibilities. They can be used to provide political support for the methodological marginalization of many of the positions advanced in this handbook.

This complex political terrain defines the many traditions and strands of qualitative research: the British and its presence in other national contexts; the American pragmatic, naturalistic, and interpretive traditions in sociology, anthropology, communications, and education; the German and French phenomenological, hermeneutic, semiotic, Marxist, structural, and poststructural perspectives; feminist, African American, Latino, and queer studies; and studies of indigenous and aboriginal cultures. The politics of qualitative research create a tension that informs each of the above traditions. This tension itself is constantly being reexamined and interrogated, as qualitative research confronts a changing historical world, new intellectual positions, and its own institutional and academic conditions.

To summarize, qualitative research is many things to many people. Its essence is two-fold: (1) a commitment to some version of the naturalistic, interpretive approach to its subject matter and (2) an ongoing critique of the politics and methods of postpositivism. We turn now to a brief discussion of the major differences between qualitative and quantitative approaches to research. We will then discuss ongoing differences and tensions within qualitative inquiry.

Qualitative Versus Quantitative Research

The word *qualitative* implies an emphasis on the qualities of entities and on processes and meanings that are not experimentally examined or measured (if measured at all) in terms of quantity, amount, intensity, or frequency. Qualitative researchers stress the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry. Such researchers emphasize the value-laden nature of inquiry. They seek answers to questions that stress *how* social experience is created and given meaning. In contrast, quantitative studies emphasize the measurement and analysis of causal relationships between variables, not processes. Proponents claim that their work is done from within a value-free framework.

Research Styles: Doing the Same Things Differently?

Of course, both qualitative and quantitative researchers “think they know something about society worth telling to others, and they use a variety of forms, media, and means to communicate their ideas and findings” (Becker, 1986, p. 122). Qualitative research differs from quantitative research in five significant ways (Becker, 1996). These points of difference turn on different ways of addressing the same set of issues. They return always to the politics of research and who has the power to legislate correct solutions to these problems.

Using Positivism and Postpositivism: First, both perspectives are shaped by the positivist and postpositivist traditions in the physical and social sciences (see discussion below). These two positivist science traditions hold to naïve and critical realist positions concerning reality and its perception. Proponents of the positivist version contend that there is a reality out there to be studied, captured, and understood, whereas the postpositivists argue that reality can never be fully apprehended, only approximated (Guba, 1990a, p. 22). Postpositivism relies on multiple methods as a way of capturing as much of reality as possible. At the same time, emphasis is placed on the discovery and verification of theories. Traditional evaluation criteria like internal and external validity are stressed, as are the use of qualitative procedures that lend themselves to structured (sometimes statistical) analysis. Computer-assisted methods of analysis, which permit

frequency counts, tabulations, and low-level statistical analyses, may also be employed.

The positivist and postpositivist traditions linger like long shadows over the qualitative research project. Historically, qualitative research was defined within the positivist paradigm, where qualitative researchers attempted to do good positivist research with less rigorous methods and procedures. Some mid-century qualitative researchers (Becker, Geer, Hughes, & Strauss, 1961) reported findings from participant observations in terms of quasi-statistics. As recently as 1999 (Strauss & Corbin, 1999), two leaders of the grounded theory approach to qualitative research attempted to modify the usual canons of good (positivistic) science to fit their own postpositivist conception of rigorous research (but see Charmaz, Chapter 21, this volume; also see Glaser, 1992). Some applied researchers, while claiming to be atheoretical, often fit within the positivist or postpositivist framework by default.

Uwe Flick (2002, pp. 2–3) usefully summarizes the differences between these two approaches to inquiry. He observes that the quantitative approach has been used for purposes of isolating “causes and effects . . . operationalizing theoretical relations . . . [and] measuring and . . . quantifying phenomena . . . allowing the generalization of findings” (p. 3). But today, doubt is cast on such projects.

Rapid social change and the resulting diversification of life worlds are increasingly confronting social researchers with new social contexts and perspectives . . . traditional deductive methodologies . . . are failing . . . thus research is increasingly forced to make use of inductive strategies instead of starting from theories and testing them . . . knowledge and practice are studied as local knowledge and practice. (Flick, 2002, p. 2)

George and Louise Spindler (1992) summarize their qualitative approach to quantitative materials.

Instrumentation and quantification are simply procedures employed to extend and reinforce certain kinds of data, interpretations and test hypotheses across samples. Both must be kept in their place. One must avoid their premature or overly extensive use as a security mechanism. (p. 69)

While many qualitative researchers in the postpositivist tradition will use statistical measures, methods, and documents as a way of locating a group of subjects within a larger population, they will seldom report their findings in terms of the kinds of complex statistical measures or methods that quantitative researchers are drawn to (i.e., path, regression, log-linear analyses).

Accepting Postmodern Sensibilities: The use of quantitative, positivist methods and assumptions has been rejected by a new generation of qualitative researchers who are attached to poststructural or postmodern sensibilities. These researchers argue

that positivist methods are but one way of telling a story about society or the social world. They may be no better or no worse than any other method; they just tell a different kind of story.

This tolerant view is not shared by everyone. Many members of the critical theory, constructivist, poststructural, and postmodern schools of thought reject positivist and postpositivist criteria when evaluating their own work. They see these criteria as being irrelevant to their work and contend that positivist and postpositivist research reproduces only a certain kind of science, a science that silences too many voices. These researchers seek alternative methods for evaluating their work, including verisimilitude, emotionality, personal responsibility, an ethic of caring, political praxis, multivoiced texts, dialogues with subjects, and so on. In response, positivist and postpositivists argue that what they do is good science, free of individual bias and subjectivity. As noted above, they see postmodernism and poststructuralism as attacks on reason and truth.

Capturing the Individual’s Point of View: Both qualitative and quantitative researchers are concerned with the individual’s point of view. However, qualitative investigators think they can get closer to the actor’s perspective by detailed interviewing and observation. They argue that quantitative researchers are seldom able to capture the subject’s perspective because they have to rely on more remote, inferential empirical methods and materials. Many quantitative researchers regard empirical materials produced by interpretive methods as unreliable, impressionistic, and not objective.

Examining the Constraints of Everyday Life: Qualitative researchers are more likely to confront and come up against the constraints of the everyday social world. They see this world in action and embed their findings in it. Quantitative researchers abstract from this world and seldom study it directly. They seek a nomothetic or etic science based on probabilities derived from the study of large numbers of randomly selected cases. These kinds of statements stand above and outside the constraints of everyday life. Qualitative researchers, on the other hand, are committed to an emic, ideographic, case-based position, which directs their attention to the specifics of particular cases.

Securing Rich Descriptions: Qualitative researchers believe that rich descriptions of the social world are valuable, whereas quantitative researchers, with their etic, nomothetic commitments, are less concerned with such detail. They are deliberately unconcerned with such descriptions because such detail interrupts the process of developing generalizations.

These five points of difference described above (using positivism and postpositivism, accepting postmodern sensibilities, capturing the individual’s point of view, examining the constraints of everyday life, securing thick descriptions) reflect commitments to different styles of research, different epistemologies,

and different forms of representation. Each work tradition is governed by a different set of genres, and each has its own classics and its own preferred forms of representation, interpretation, trustworthiness, and textual evaluation (see Becker, 1986, pp. 134–135). Qualitative researchers use ethnographic prose, historical narratives, first-person accounts, still photographs, life history, fictionalized “facts,” and biographical and autobiographical materials, among others. Quantitative researchers use mathematical models, statistical tables, and graphs and usually write in an impersonal, third-person prose.

■ TENSIONS WITHIN QUALITATIVE RESEARCH

It is erroneous to presume that qualitative researchers share the same assumptions about these five points of difference. As the discussion below will reveal, positivist, postpositivist, and poststructural differences define and shape the discourses of qualitative research. Realists and postpositivists within the interpretive, qualitative research tradition criticize poststructuralists for taking the textual, narrative turn. These critics contend that such work is navel-gazing. It produces the conditions “for a dialogue of the deaf between itself and the community” (Silverman, 1997, p. 240). Those who attempt to capture the point of view of the interacting subject in the world are accused of naïve humanism, of reproducing a Romantic impulse that elevates the experiential to the level of the authentic (Silverman, 1997, p. 248).

Still others argue that lived experience is ignored by those who take the textual, performance turn. David Snow and Calvin Morrill (1995) argue that

This performance turn, like the preoccupation with discourse and storytelling, will take us further from the field of social action and the real dramas of everyday life and thus signal the death knell of ethnography as an empirically grounded enterprise. (p. 361)

Of course, we disagree.

According to Martyn Hammersley (2008, p. 1), qualitative research is currently facing a crisis symbolized by an ill-conceived postmodernist image of qualitative research, which is dismissive of traditional forms of inquiry. He feels that “unless this dynamic can be interrupted the future of qualitative research is endangered” (p. 11).

Paul Atkinson and Sara Delamont (2006), two qualitative scholars in the traditional, classic Chicago School tradition,¹⁸ offer a corrective. They remain committed to qualitative (and quantitative) research “*provided that they are conducted rigorously and contribute to robustly useful knowledge*” (p. 749, italics in original). Of course, these scholars are committed to social policy initiatives at some level. But, for them, the postmodern image of qualitative inquiry threatens and undermines the

value of traditional qualitative inquiry. Atkinson and Delamont exhort qualitative researchers to “think hard about whether their investigations are the best social science they could be” (p. 749). Patricia and Peter Adler (2008) implore the radical postmodernists to “give up the project for the good of the discipline and for the good of society” (p. 23).

Hammersley (2008, pp. 134–136, 144), extends the traditional critique, finding little value in the work of ethnographic postmodernists and literary ethnographers.¹⁹ This new tradition, he asserts, legitimates speculative theorizing, celebrates obscurity, and abandons the primary task of inquiry, which is to produce truthful knowledge about the world (p. 144). Poststructural inquirers get it from all sides. The criticisms, Carolyn Ellis (2009, p. 231) observes, fall into three overlapping categories. Our work (1) is too aesthetic and not sufficiently realistic; it does not provide hard data; (2) is too realistic and not mindful of poststructural criticisms concerning the “real” self and its place in the text; and (3) is not sufficiently aesthetic, or literary; that is, we are second-rate writers and poets (p. 232).

The Politics of Evidence

The critics’ model of science is anchored in the belief that there is an empirical world that is obdurate and talks back to investigators. This is an empirical science based on evidence that corroborates interpretations. This is a science that returns to and is lodged in the real, a science that stands outside nearly all of the turns listed above; this is Chicago School neo-postpositivism.

Contrast this certain science to the position of those who are preoccupied with the politics of evidence. Jan Morse (2006), for example, says: “Evidence is not just something that is out there. Evidence has to be produced, constructed, represented. Furthermore, the politics of evidence cannot be separated from the ethics of evidence” (pp. 415–416). Under the Jan Morse model, representations of empirical reality become problematic. Objective representation of reality is impossible. Each representation calls into place a different set of ethical questions regarding evidence, including how it is obtained and what it means. But surely a middle ground can be found. If there is a return to the spirit of the paradigm dialogues of the 1980s, then multiple representations of a situation should be encouraged, perhaps placed alongside one another.

Indeed, the interpretive camp is not antisience, *per se*. We do something different. We believe in multiple forms of science: soft, hard, strong, feminist, interpretive, critical, realist, postrealist, and post-humanist. In a sense, the traditional and postmodern projects are incommensurate. We interpret, we perform, we interrupt, we challenge, and we believe nothing is ever certain. We want performance texts that quote history back to itself, texts that focus on epiphanies; on the intersection of biography, history, culture, and politics; on turning point moments in people’s lives. The critics are correct on this point. We have a

political orientation that is radical, democratic, and interventionist. Many postpositivists share these politics.

Critical Realism

For some, there is a third stream between naïve positivism and poststructuralism. Critical realism is an antipositivist movement in the social sciences closely associated with the works of Roy Bhaskar and Rom Harré (Danermark, Ekstrom, Jakobsen, & Karlsson, 2002). Critical realists use the word *critical* in a particular way. This is not Frankfurt School critical theory, although there are traces of social criticism here and there (Danermark et al., 2002, p. 201). *Critical*, instead, refers to a transcendental realism that rejects methodological individualism and universal claims to truth. Critical realists oppose logical positivist, relativist, and antifoundational epistemologies. Critical realists agree with the positivists that there is a world of events out there that is observable and independent of human consciousness. Knowledge about this world is socially constructed. Society is made up of feeling, thinking human beings, and their interpretations of the world must be studied (Danermark et al., 2002, p. 200). A correspondence theory of truth is rejected. Critical realists believe that reality is arranged in levels. Scientific work must go beyond statements of regularity to the analysis of the mechanisms, processes, and structures that account for the patterns that are observed.

Still, as postempiricist, antifoundational, critical theorists, we reject much of what is advocated here. Throughout the last century, social science and philosophy were continually tangled up with one another. Various “isms” and philosophical movements criss-crossed sociological and educational discourse, from positivism to postpositivism to analytic and linguistic philosophy, to hermeneutics, structuralism, and poststructuralism; to Marxism, feminism, and current post-post-versions of all of the above. Some have said that the logical positivists steered the social sciences on a rigorous course of self-destruction.

We do not think critical realism will keep the social science ship afloat. The social sciences are normative disciplines, always already embedded in issues of value, ideology, power, desire, sexism, racism, domination, repression, and control. We want a social science committed up front to issues of social justice, equity, nonviolence, peace, and universal human rights. We do not want a social science that says it can address these issues if it wants to do so. For us, this is no longer an option.

■ QUALITATIVE RESEARCH AS PROCESS

Three interconnected, generic activities define the qualitative research process. They go by a variety of different labels, including theory, method, and analysis; or ontology, epistemology, and

methodology. Behind these terms stands the personal biography of the researcher, who speaks from a particular class, gendered, racial, cultural, and ethnic community perspective. The gendered, multiculturally situated researcher approaches the world with a set of ideas, a framework (theory, ontology) that specifies a set of questions (epistemology), which are then examined (methodology, analysis) in specific ways. That is, empirical materials bearing on the question are collected and then analyzed and written about. Every researcher speaks from within a distinct interpretive community, which configures, in its special way, the multicultural, gendered components of the research act.

In this volume, we treat these generic activities under five headings or phases: the researcher and the researched as multicultural subjects, major paradigms and interpretive perspectives, research strategies, methods of collecting and analyzing empirical materials, and the art of interpretation. Behind and within each of these phases stands the biographically situated researcher. This individual enters the research process from inside an interpretive community. This community has its own historical research traditions, which constitute a distinct point of view. This perspective leads the researcher to adopt particular views of the “other” who is studied. At the same time, the politics and the ethics of research must also be considered, for these concerns permeate every phase of the research process.

■ THE OTHER AS RESEARCH SUBJECT

From its turn-of-the-century birth in modern, interpretive form, qualitative research has been haunted by a double-faced ghost. On the one hand, qualitative researchers have assumed that qualified, competent observers could, with objectivity, clarity, and precision, report on their own observations of the social world, including the experiences of others. Second, researchers have held to the belief in a real subject or real individual who is present in the world and able, in some form, to report on his or her experiences. So armed, researchers could blend their own observations with the self-reports provided by subjects through interviews, life story, personal experience, and case study documents.

These two beliefs have led qualitative researchers across disciplines to seek a method that would allow them to record accurately their own observations while also uncovering the meanings their subjects brought to their life experiences. This method would rely on the subjective verbal and written expressions of meaning given by the individuals, which are studied as windows into the inner life of the person. Since Wilhelm Dilthey (1900/1976), this search for a method has led to a perennial focus in the human disciplines on qualitative, interpretive methods.

Recently, as noted above, this position and its beliefs have come under assault. Poststructuralists and postmodernists

have contributed to the understanding that there is no clear window into the inner life of an individual. Any gaze is always filtered through the lenses of language, gender, social class, race, and ethnicity. There are no objective observations, only observations socially situated in the worlds of—and between—the observer and the observed. Subjects, or individuals, are seldom able to give full explanations of their actions or intentions; all they can offer are accounts or stories about what they did and why. No single method can grasp the subtle variations in ongoing human experience. Consequently, qualitative researchers deploy a wide-range of interconnected interpretive methods, always seeking better ways to make more understandable the worlds of experience that have been studied.

Table 1.1 depicts the relationships we see among the five phases that define the research process (the researcher; major paradigms; research strategies; methods of collecting and analyzing empirical materials; and the art, practices, and politics of interpretation). Behind all but one of these phases stands the biographically situated researcher. These five levels of activity, or practice, work their way through the biography of the researcher. We take them up in brief order here, for each phase is more fully discussed in the transition sections between the various parts of this volume.

Phase 1: The Researcher

Our remarks above indicate the depth and complexity of the traditional and applied qualitative research perspectives into which a socially situated researcher enters. These traditions locate the researcher in history, simultaneously guiding and constraining work that will be done in any specific study. This field has been constantly characterized by diversity and conflict, and these are its most enduring traditions (see Levin & Greenwood, Chapter 2, this volume). As a carrier of this complex and contradictory history, the researcher must also confront the ethics and politics of research (Christians, Chapter 4, this volume). It is no longer possible for the human disciplines to research the native, the indigenous other, in a spirit of value-free inquiry. Today researchers struggle to develop situational and transsituational ethics that apply to all forms of the research act and its human-to-human relationships. We no longer have the option of deferring the decolonization project.

Phase 2: Interpretive Paradigms

All qualitative researchers are philosophers in that “universal sense in which all human beings . . . are guided by highly abstract principles” (Bateson, 1972, p. 320). These principles combine beliefs about *ontology* (What kind of being is the human being? What is the nature of reality?), *epistemology* (What is the relationship between the inquirer and the known?), and *methodology* (How do we know the world or gain knowledge of it?)

Table 1.1 The Research Process

| |
|---|
| <i>Phase 1: The Researcher as a Multicultural Subject</i> |
| History and research traditions |
| Conceptions of self and the other |
| The ethics and politics of research |
| <i>Phase 2: Theoretical Paradigms and Perspectives</i> |
| Positivism, postpositivism |
| Interpretivism, constructivism, hermeneutics |
| Feminism(s) |
| Racialized discourses |
| Critical theory and Marxist models |
| Cultural studies models |
| Queer theory |
| Post-colonialism |
| <i>Phase 3: Research Strategies</i> |
| Design |
| Case study |
| Ethnography, participant observation, performance ethnography |
| Phenomenology, ethnomethodology |
| Grounded theory |
| Life history, <i>testimonio</i> |
| Historical method |
| Action and applied research |
| Clinical research |
| <i>Phase 4: Methods of Collection and Analysis</i> |
| Interviewing |
| Observing |
| Artifacts, documents, and records |
| Visual methods |
| Autoethnography |
| Data management methods |
| Computer-assisted analysis |
| Textual analysis |
| Focus groups |
| Applied ethnography |
| <i>Phase 5: The Art, Practices, and Politics of Interpretation and Evaluation</i> |
| Criteria for judging adequacy |
| Practices and politics of interpretation |
| Writing as interpretation |
| Policy analysis |
| Evaluation traditions |
| Applied research |

(see Guba, 1990a, p. 18; Lincoln & Guba, 1985, pp. 14–15; and Lincoln, Lynham, & Guba in Chapter 6 of this volume). These beliefs shape how the qualitative researcher sees the world and acts in it. The researcher is “bound within a net of epistemological and ontological premises which—regardless of ultimate truth or falsity—become partially self-validating” (Bateson, 1972, p. 314).

The net that contains the researcher’s epistemological, ontological, and methodological premises may be termed a *paradigm* (Guba, 1990a, p. 17) or interpretive framework, a “basic set of beliefs that guides action” (Guba, 1990a, p. 17). All research is interpretive: guided by a set of beliefs and feelings about the world and how it should be understood and studied. Some beliefs may be taken for granted, invisible, or only assumed, whereas others are highly problematic and controversial. Each interpretive paradigm makes particular demands on the researcher, including the questions that are asked and the interpretations that are brought to them.

At the most general level, four major interpretive paradigms structure qualitative research: positivist and postpositivist, constructivist-interpretive, critical (Marxist, emancipatory), and feminist-poststructural. These four abstract paradigms become more complicated at the level of concrete specific interpretive communities. At this level, it is possible to identify not only the constructivist but also multiple versions of feminism (Afrocentric and poststructural),²⁰ as well as specific ethnic, feminist, endarkened, social justice, Marxist, cultural studies, disability, and non-Western-Asian paradigms. These perspectives or paradigms are examined in Part II of this volume.

The paradigms examined in Part II work against or alongside (and some within) the positivist and postpositivist models. They all work within relativist ontologies (multiple constructed realities), interpretive epistemologies (the knower and known interact and shape one another), and interpretive, naturalistic methods.

Table 1.2 presents these paradigms and their assumptions, including their criteria for evaluating research, and the typical form that an interpretive or theoretical statement assumes in the paradigm.²¹

Each paradigm is explored in considerable detail in chapters 6 through 10. The positivist and postpositivist paradigms were discussed above. They work from within a realist and critical realist ontology and objective epistemologies, and they rely on experimental, quasi-experimental, survey, and rigorously defined qualitative methodologies.

The *constructivist paradigm* assumes a relativist ontology (there are multiple realities), a subjectivist epistemology (knower and respondent co-create understandings), and a naturalistic (in the natural world) set of methodological procedures. Findings are usually presented in terms of the criteria of grounded theory or pattern theories (in this volume, see Lincoln, Lynham, & Guba, Chapter 6; Creswell, Chapter 15; Teddlie & Tashakkori, Chapter 16; Charmaz, Chapter 21; Morse, Chapter 24; Altheide & Johnson, Chapter 35; and St.Pierre, Chapter 37). Terms like credibility, transferability, dependability, and confirmability replace the usual positivist criteria of internal and external validity, reliability, and objectivity.

Table 1.2 Interpretive Paradigms

| <i>Paradigm/Theory</i> | <i>Criteria</i> | <i>Form of Theory</i> | <i>Type of Narration</i> |
|-------------------------------|--|---------------------------------------|---|
| Positivist/ postpositivist | Internal, external validity | Logical-deductive, grounded | Scientific report |
| Constructivist | Trustworthiness, credibility, transferability, confirmability | Substantive-formal, standpoint | Interpretive case studies, ethnographic fiction |
| Feminist | Afrocentric, lived experience, dialogue, caring, accountability, race, class, gender, reflexivity, praxis, emotion, concrete grounding, embodied | Critical, standpoint | Essays, stories, experimental writing |
| Ethnic | Afrocentric, lived experience, dialogue, caring, accountability, race, class, gender | Standpoint, critical, historical | Essays, fables, dramas |
| Marxist | Emancipatory theory, falsifiability, dialogical, race, class, gender | Critical, historical, economic | Historical, economic, sociocultural analyses |
| Cultural studies | Cultural practices, praxis, social texts, subjectivities | Social criticism | Cultural theory-as-criticism |
| Queer theory | Reflexivity, deconstruction | Social criticism, historical analysis | Theory-as-criticism, autobiography |

Feminist, ethnic, Marxist, cultural studies, queer theory, Asian, and disability models privilege a materialist-realist ontology; that is, the real world makes a material difference in terms of race, class, and gender. Subjectivist epistemologies and naturalistic methodologies (usually ethnographies) are also employed. Empirical materials and theoretical arguments are evaluated in terms of their emancipatory implications. Criteria from gender and racial communities (e.g., African American) may be applied (emotionality and feeling, caring, personal accountability, dialogue).

Poststructural feminist theories emphasize problems with the social text, its logic, and its inability to ever represent the world of lived experience fully. Positivist and postpositivist criteria of evaluation are replaced by other terms, including the reflexive, multivoiced text, which is grounded in the experiences of oppressed people.

The cultural studies and queer theory paradigms are multi-focused, with many different strands drawing from Marxism, feminism, and the postmodern sensibility (in this volume, Giardina & Newman, Chapter 10; Plummer, Chapter 11; St.Pierre, Chapter 37). There is a tension between a humanistic cultural studies, which stresses lived experiences (meaning), and a more structural cultural studies project, which stresses the structural and material determinants and effects (race, class, gender) of experience. Of course, there are two sides to every coin; both sides are needed and are indeed critical. The cultural studies and queer theory paradigms use methods strategically, that is, as resources for understanding and for producing resistances to local structures of domination. Such scholars may do close textual readings and discourse analysis of cultural texts (in this volume, Olesen, Chapter 7; Chase, Chapter 25), as well as local, online, reflexive, and critical ethnographies; open-ended interviewing; and participant observation. The focus is on how race, class, and gender are produced and enacted in historically specific situations.

Paradigm and personal history in hand, focused on a concrete empirical problem to examine, the researcher now moves to the next stage of the research process, namely working with a specific strategy of inquiry.

Phase 3: Strategies of Inquiry and Interpretive Paradigms

Table 1.1 presents some of the major strategies of inquiry a researcher may use. Phase 3 begins with research design, which broadly conceived involves a clear focus on the research question, the purposes of the study, “what information most appropriately will answer specific research questions, and which strategies are most effective for obtaining it” (LeCompte & Preissle with Tesch, 1993, p. 30; see also Cheek, Chapter 14, this volume). A research design describes a flexible set of guidelines that connect theoretical paradigms, first, to strategies of inquiry

and, second, to methods for collecting empirical material. A research design situates researchers in the empirical world and connects them to specific sites, people, groups, institutions, and bodies of relevant interpretive material, including documents and archives. A research design also specifies how the investigator will address the two critical issues of representation and legitimation.

A strategy of inquiry refers to a bundle of skills, assumptions, and practices that researchers employ as they move from their paradigm to the empirical world. Strategies of inquiry put paradigms of interpretation into motion. At the same time, strategies of inquiry also connect the researcher to specific methods of collecting and analyzing empirical materials. For example, the case study relies on interviewing, observing, and document analysis. Research strategies implement and anchor paradigms in specific empirical sites or in specific methodological practices, for example, making a case an object of study. These strategies include the case study, phenomenological and ethnomethodological techniques, the use of grounded theory, and biographical, autoethnographic, historical, action, and clinical methods. Each of these strategies is connected to a complex literature; each has a separate history, exemplary works, and preferred ways for putting the strategy into motion.

Phase 4: Methods of Collecting and Analyzing Empirical Materials

The researcher has several methods for collecting empirical materials.²² These methods are taken up in Part IV. They range from the interview to direct observation, the use of visual materials or personal experience. The researcher may also use a variety of different methods of reading and analyzing interviews or cultural texts, including content, narrative, and semiotic strategies. Faced with large amounts of qualitative materials, the investigator seeks ways of managing and interpreting these documents, and here data management methods and computer-assisted models of analysis may be of use. In this volume, David L. Altheide and John M. Johnson (Chapter 35), Laura L. Ellingson (Chapter 36), and Judith Davidson and Silvana diGregorio (Chapter 38) take up these techniques.

Phase 5: The Art and Politics of Interpretation and Evaluation

Qualitative research is endlessly creative and interpretive. The researcher does not just leave the field with mountains of empirical materials and easily write up his or her findings. Qualitative interpretations are constructed. The researcher first creates a field text consisting of fieldnotes and documents from the field, what Roger Sanjek (1992, p. 386) calls “indexing” and David Plath (1990, p. 374) “filework.” The writer-as-interpreter moves from this text to a research text; notes and interpretations based

on the field text. This text is then re-created as a working interpretive document that contains the writer's initial attempts to make sense out of what has been learned. Finally, the writer produces the public text that comes to the reader. This final tale from the field may assume several forms: confessional, realist, impressionistic, critical, formal, literary, analytic, grounded theory, and so on (see Van Maanen, 1988).

The interpretive practice of making sense of one's findings is both artistic and political. Multiple criteria for evaluating qualitative research now exist, and those we emphasize stress the situated, relational, and textual structures of the ethnographic experience. There is no single interpretive truth. As argued earlier, there are multiple interpretive communities, each having its own criteria for evaluating an interpretation.

Program evaluation is a major site of qualitative research, and qualitative researchers can influence social policy in important ways. Applied, qualitative research in the social sciences has a rich history (discussed in this volume by Levin & Greenwood, Chapter 2; Cheek, Chapter 14; Brydon-Miller, Kral, Maguire, Noffke, & Sabhlok, Chapter 23; Morse, Chapter 24; Torrance, Chapter 34; Abma & Widdershoven, Chapter 41). This is the critical site where theory, method, praxis, action, and policy all come together. Qualitative researchers can isolate target populations, show the immediate effects of certain programs on such groups, and isolate the constraints that operate against policy changes in such settings. Action and clinically oriented qualitative researchers can also create spaces for those who are studied (the other) to speak. The evaluator becomes the conduit for making such voices heard.

Bridging the Historical Moments: What Comes Next?

St. Pierre (2004) argues that we are already in the post "post" period—post-poststructuralism, post-postmodernism, post-experimental. What this means for interpretive, ethnographic practices is still not clear. But it is certain that things will never again be the same. We are in a new age where messy, uncertain multivoiced texts, cultural criticism, and new experimental works will become more common, as will more reflexive forms of fieldwork, analysis, and intertextual representation. In a complex space like this, pedagogy becomes critical—that is, How do we teach qualitative methods? Judith Preissle (Chapter 42) and Margaret Eisenhart and S. Jurow (Chapter 43) offer insights on the future. It is true, as the poet said, the center no longer holds. We can reflect on what should be in this new center.

Thus, we come full circle. And returning to our bridge metaphor, the chapters that follow take the researcher back and forth through every phase of the research act. Like a good bridge, the chapters provide for two-way traffic, coming and going between moments, formations, and interpretive communities. Each chapter examines the relevant histories, controversies, and current practices that are associated with each paradigm, strategy,

and method. Each chapter also offers projections for the future, where a specific paradigm, strategy, or method will be 10 years from now, deep into the formative years of the next century.

In reading this volume, it is important to remember that the field of qualitative research is defined by a series of tensions, contradictions, and hesitations. This tension works back and forth between and among (1) the broad, doubting, postmodern sensibility; (2) the more certain, more traditional positivist, postpositivist, and naturalistic conceptions of this project; and (3) an increasingly conservative, neoliberal global environment. All of the chapters that follow are caught in and articulate these tensions.

NOTES

1. The following paragraphs draw from Denzin (2010, pp. 19–25).
2. They contend that our second moment, the Golden Age (1950–1970), was marked by the debunking of positivism, the emergence of postpositivism, and the development of designs that used mixed quantitative and qualitative methods. Full-scale conflict developed throughout the 1970–1990 period, the time of the first "paradigm war."
3. Conflict broke out between the many different empowerment pedagogies: feminist, anti-racist, radical, Freirean, liberation theology, postmodernists, poststructuralists, cultural studies, and so on (see Guba & Lincoln, 2005; also, Erickson, Chapter 3, this volume).
4. Recall bell hooks's reading of the famous cover photo on *Writing Culture* (Clifford & Marcus, 1986), which consists of a picture of Stephen Tyler doing fieldwork in India. Tyler is seated some distance from three dark-skinned people. A child is poking its head out of a basket. A woman is hidden in the shadows of the hut. A male, a checkered white and black shawl across his shoulder, elbow propped on his knee, hand resting along the side of his face, is staring at Tyler. Tyler is writing in a field journal. A piece of white cloth is attached to his glasses, perhaps shielding him from the sun. This patch of whiteness marks Tyler as the white male writer studying these passive brown and black people. Indeed, the brown male's gaze signals some desire or some attachment to Tyler. In contrast, the female's gaze is completely hidden by the shadows and by the words in the book's title, which cross her face (hooks, 1990, p. 127).
5. Qualitative research has separate and distinguished histories in education, social work, communications, psychology, history, organizational studies, medical science, anthropology, and sociology.
6. Definitions: *positivism*: Objective accounts of the real world can be given; *postpositivism*: Only partially objective accounts of the world can be produced, for all methods are flawed; *foundationalism*: We can have an ultimate grounding for our knowledge claims about the world, and this involves the use of empiricist and positivist epistemologies (Schwandt, 1997a, p. 103); *nonfoundationalism*: We can make statements about the world without "recourse to ultimate proof or foundations for that knowing" (Schwandt, 1997a, p. 102); *quasi-foundationalism*: Certain knowledge claims about the world based on neorealist criteria can be made, including the correspondence concept of truth. There is an independent reality that can be mapped.

7. Jameson (1991, pp. 3–4) reminds us that any periodization hypothesis is always suspect, even one that rejects linear, stage-like models. It is never clear to what reality a stage refers. What divides one stage from another is always debatable. Our seven moments are meant to mark discernible shifts in style, genre, epistemology, ethics, politics, and aesthetics.

8. See Denzin and Lincoln (2005, pp. 13–21) for an extended discussion of each of these phases. This model has been termed a progress narrative by Alasuutari (2004, pp. 599–600) and Seale, Gobo, Gubrium, and Silverman (2004, p. 2). The critics assert that we believe that the most recent moment is the most up-to-date, the avant-garde, the cutting edge (Alasuutari, 2004, p. 601). Naturally, we dispute this reading. Teddlie and Tashakkori (2003a, pp. 5–8) have modified our historical periods to fit their historical analysis of the major moments in the emergence of mixed methods in the last century.

9. **Definitions:** *structuralism*: Any system is made up of a set of oppositional categories embedded in language; *semiotics*: the science of signs or sign systems—a structuralist project; *poststructuralism*: Language is an unstable system of referents, making it impossible to ever completely capture the meaning or an action, text, or intention; *postmodernism*: a contemporary sensibility, developing since World War II, which privileges no single authority, method, or paradigm; *hermeneutics*: An approach to the analysis of texts that stresses how prior understandings and prejudices shape the interpretive process; *phenomenology*: A complex system of ideas associated with the works of Edmund Husserl, Martin Heidegger, Jean-Paul Sartre, Maurice Merleau-Ponty, and Alfred Schutz; *cultural studies*: a complex, interdisciplinary field that merges with critical theory, feminism, and post-structuralism.

10. Of course, all settings are natural, that is, places where everyday experience takes place. Qualitative researchers study people doing things together in the places where these things are done (Becker, 1986). There is no field site or natural place where one goes to do this kind of work (see also Gupta & Ferguson, 1997, p. 8). The site is constituted through our interpretive practices. Historically, analysts have distinguished between experimental (laboratory) and field (natural) research settings; hence the argument that qualitative research is naturalistic. Activity theory erases this distinction (Keller & Keller, 1996, p. 20; Vygotsky, 1978).

11. “The meaning of *bricoleur* in French popular speech is ‘someone who works with his (or her) hands and uses devious means compared to those of the craftsman . . . the *bricoleur* is practical and gets the job done’ (Weinstein & Weinstein, 1991, p. 161). These authors provide a history of this term, connecting it to the works of the German sociologist and social theorist Georg Simmel, and by implication to Charles Baudelaire. Martyn Hammersley (2000) disputes our use of this term. Following Claude Lévi-Strauss, he reads the *bricoleur* as a myth maker. He suggests it be replaced with the notion of the boat builder. Hammersley also quarrels with our “moments” model of qualitative research, contending it implies some sense of progress.

12. Brian De Palma reproduces this baby carriage scene in his 1987 film, *The Untouchables*.

13. In the harbor, the muzzles of the Potemkin’s two huge guns swing slowly into the camera. Words on screen inform us: “The brutal military power answered by guns of the battleship.” A final famous three-shot montage sequence shows, first, a sculptured sleeping lion,

then the lion rising from his sleep, and finally the lion roaring, symbolizing the rage of the Russian people (Cook, 1981, p. 167). In this sequence, Eisenstein uses montage to expand time, creating a psychological duration for this horrible event. By drawing out this sequence, by showing the baby in the carriage, the soldiers firing on the citizens, the blood on the mother’s glove, the descending carriage on the steps, he suggests a level of destruction of great magnitude.

14. Here it is relevant to make a distinction between techniques that are used across disciplines and methods that are used within disciplines. Ethnomethodologists, for example, employ their approach as a method, whereas others selectively borrow that method-as-technique for their own applications. Harry Wolcott (in conversation) suggests this distinction. It is also relevant to make a distinction between topic, method, and resource. Methods can be studied as topics of inquiry; that is how a case study gets done. In this ironic, ethnomethodological sense, method is both a resource and a topic of inquiry.

15. Indeed any attempt to give an essential definition of qualitative research requires a qualitative analysis of the circumstances that produce such a definition.

16. They identify four major mixed methods designs: triangulation, embedded, explanatory, and exploratory (Clark et al., 2008, p. 371).

17. Their emergent model focuses on methods that break out of traditional frameworks and exploit new technologies and innovations; this is a process model that works between politics, epistemology, theory, and methodology.

18. There are several generations of the Chicago School, from Robert Park and Ernest Burgess, Herbert Blumer, and Everett Hughes (1920–1950) period, to second (Becker, Strauss, Goffman), to third (Hammersley, Atkinson, Delamont, Snow, Anderson, Fine, Adler and Adler, Prus, Maines, Flaherty, Sanders et al).

19. His blanket term for auto, performance, poststructural ethnography.

20. Olesen (Chapter 7, this volume) identifies three strands of feminist research: mainstream empirical; standpoint and cultural studies; and poststructural, postmodern; placing Afrocentric and other models of color under the cultural studies and postmodern categories.

21. These, of course, are our interpretations of these paradigms and interpretive styles.

22. *Empirical materials* is the preferred term for what are traditionally described as data.

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