



## The Qualitative Report

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Volume 17 | Number 29

Article 2

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7-16-2012

# Being an Insider Researcher While Conducting Case Study Research

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### Recommended APA Citation

Unluer, S. (2012). Being an Insider Researcher While Conducting Case Study Research. *The Qualitative Report*, 17(29), 1-14. Retrieved from <http://nsuworks.nova.edu/tqr/vol17/iss29/2>

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## Being an Insider Researcher While Conducting Case Study Research

### **Abstract**

It is crucial for social researchers to clarify their researchers' roles, especially for those utilizing qualitative methodology to make their research credible. The purpose of this paper is to examine the advantages and disadvantages of the researcher's insider role, an instructor, occupied within case study research on the integration of Information and Communication Technologies (ICT) in the teaching-learning process at the School for the Handicapped (SfH) in Turkey. In this respect the author will demonstrate and discuss the advantages and disadvantages of being an insider-researcher considering the researcher's role, determining the case, the aim and research questions of the study, issues of the research design, the collection and analysis of data, ethical issues and reporting the data. Each theme is discussed concerning the advantages and disadvantages of being an insider researcher. The researcher concluded that in order to conduct valid research a researcher must overcome some of the disadvantages with the help of several preventions. The results have been discussed in the light of related literature and the whole data.

### **Keywords**

Insider Researcher, Case Study, Information and Communication Technologies, School for the Handicapped

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## Being an Insider Researcher While Conducting Case Study Research

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*It is crucial for social researchers to clarify their researchers' roles, especially for those utilizing qualitative methodology to make their research credible. The purpose of this paper is to examine the advantages and disadvantages of the researcher's insider role, an instructor, occupied within case study research on the integration of Information and Communication Technologies (ICT) in the teaching-learning process at the School for the Handicapped (SfH) in Turkey. In this respect the author will demonstrate and discuss the advantages and disadvantages of being an insider-researcher considering the researcher's role, determining the case, the aim and research questions of the study, issues of the research design, the collection and analysis of data, ethical issues and reporting the data. Each theme is discussed concerning the advantages and disadvantages of being an insider researcher. The researcher concluded that in order to conduct valid research a researcher must overcome some of the disadvantages with the help of several preventions. The results have been discussed in the light of related literature and the whole data.*

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It is crucial for social researchers to clarify their researchers' roles especially for those utilizing qualitative methodology to make their research credible. The researchers that undertake qualitative studies take on a variety of member roles when they are in the research setting. These roles can range from complete membership of the group being studied (an insider) to complete stranger (an outsider) (Adler & Adler, 1994). While there are a variety of definitions for insider-researchers, generally insider-researchers are those who choose to study a group to which they belong, while outsider-researchers do not belong to the group under study (Breen, 2007).

Bonner and Tolhurst (2002) identified three key advantages of being an insider-researcher: (a) having a greater understanding of the culture being studied; (b) not altering the flow of social interaction unnaturally; and (c) having an established intimacy which promotes both the telling and the judging of truth. Further, insider-researchers generally know the politics of the institution, not only the formal hierarchy but also how it "really works". They know how to best approach people. In general, they have a great deal of knowledge, which takes an outsider a long time to acquire (Smyth & Holian, 2008).

Although there are various advantages of being an insider-researcher, there are also problems associated with being an insider. For example, greater familiarity can lead to a loss of objectivity. Unconsciously making wrong assumptions about the research process based on the researcher's prior knowledge can be considered a bias (DeLyser, 2001; Hewitt-Taylor, 2002). However, educational research is concerned with human

beings and their behaviour, involving a great number of players, each of whom brings to the research process a wide range of perspectives, including the researcher's own perspective. May (as cited in Porteli, 2008) stated that this situation can produce a more balanced and in this sense a more 'objective' account of the gradual development.

Insider-researchers may also be confronted with role duality. They often struggle to balance their insider role (instructor, nurse, geographer, etc.) and the researcher role (DeLyser, 2001; Gerrish, 1997).

As an insider, the problem is not just that the researcher may not receive or see important information. Another risk may be that the insider-researcher gains access to sensitive information. To conduct credible insider research, insider-researchers must constitute an explicit awareness of the possible effects of perceived bias on data collection and analysis, respect the ethical issues related to the anonymity of the organization and individual participants and consider and address the issues about the influencing researcher's insider role on coercion, compliance and access to privileged information, at each and every stage of the research (Smyth & Holian, 2008).

As stated above there are both advantages and disadvantages to being an insider-researcher. It is important to address and overcome the disadvantages in order to ensure credible insider research. In the context of my research, I was an insider-researcher. In this article I will discuss the advantages, and how I have overcome the problems related to being an insider in my research. In this respect I will demonstrate and discuss the advantages and disadvantages of being insider-researcher by considering the following themes. I will support my statements with excerpts from my research journal. The themes are as follows:

- My role as the researcher
- Determining the case
- The aim and research questions of the study
- Issues of the research design
- The collection and analysis of data
- Ethical issues
- Reporting the data

### **My Role as the Researcher**

As an instructor/researcher, my case study research explored the integration of Information and Communication Technologies (ICT) in the teaching-learning process at the School for the Handicapped (SfH) in Turkey (Unluer, 2010). SfH is the only higher education institution that provides vocational education for hearing-impaired youths. I have been working as an instructor for nearly 9 years at the SfH and teaching computer related courses in the Computer Training Program and the other program at the SfH.

Since the research setting was my working area, I collected the data as an insider participant observer. Insider participant observation (being a member of a group as well as the researcher) is considered the most important and challenging instrument in qualitative studies (Herrmann, 1989). The role of the instructor/researcher differed from the role of an instructor alone and from the role of a researcher alone. For instance, compared to the role of a researcher alone, there were many advantages and

disadvantages of being in an instructor/researcher position (Coghlan, 2003; Herrmann, 1989; Mercer, 2007; Rouney, 2005; Tedlock, 2000).

Many advantages of the instructor-researcher position came from the fact that I was already an insider, an accepted member of SfH and probably a respected member of the SfH. In this case, being accepted meant that I was friendly with many members of the staff in the institution. However, I should point out that although I maintained close social contact with many members of the staff, I did not have much professional contact with them except for the staff of the Computer Operator Training Program, where I was also an instructor. Therefore, I carried out the research from within in the sense that I was on site, yet professionally was not an integral part of the SfH. As I was a young faculty member, I did not have a deep knowledge about the events occurring in the SfH. Also, I did not have an administration role at the SfH. I did not have power and authority over the staff, which can affect the data collection process negatively (Smyth & Holian, 2008).

### **Determining the Case**

As stated before, the study was carried out in the SfH where I was an instructor. I started at the Computer and Instructional Technologies Doctorate Program at Anadolu University in 2003. In the light of the courses and knowledge I got from the doctorate program, I was improving myself academically. I realized that there were aspects of the school which worked well and those which worked less effectively in the process of ICT integration at the SfH. However, these impressions had to be proven with systematic and detailed data collection. The case study design seemed to be useful to understand the issues about the ICT integration at the school. When compared to other research designs, qualitative case studies seemed to enable the researchers to examine in more detail the ICT integration process of educational institutions (e.g., Chitiyo, 2006; Demiraslan & Usluel, 2006; Eteokleous, 2008; Hsu, 2006; Işıkoğlu, 2002; Lim & Hung, 2003; Lim & Khine, 2006; Pompeo, 2004; Puga, 2006; Robertson, Grady, Fluck, & Webb, 2006; Shafiei, 2005; Shanahan, 2006; Shigemitsu, 2004; Toledo, 2005; Wilson & Peterson, 1995) by allowing comprehensive collection of data from multiple sources. My advisors and I decided to start with examining the conditions of the school. To improve the disadvantaged sides of the school in the process of ICT integration, my advisors and I planned to conduct this research within my PhD dissertation. The supportive attitudes of the principal of the SfH also affected entering the research site. As a faculty member at the university, the principal also conducted and participated in several research projects. The principal's attitudes towards me and my research were positive. I would say that I sensed that he welcomed this research in SfH. I would not have even imagined conducting research in the school if he had not been that supportive.

### **Aim and Research Questions of the Study**

The general aim of this research was to describe the integration of ICTs in the teaching-learning process at the SfH. In the process of determining the research questions, my insider status affected the process. Although it was easy for me to generate "real questions" to which I did not know the answer, I had difficulties in developing questions to which I already knew the answers. Real questions mean that we discover

their answer organically. For instance, as an instructor of computer related courses I knew the definition of the ICT. However for our research aim I had to ask this question to the participants. We were afraid of giving participants the impression that they were being tested. In fact, the purpose of asking this question was not to test but to understand the participants' knowledge about the subject. It was important to obtain such information because individuals use ICT in the way they define it. We held a number of meetings with my advisors to exclude this question from the testing environment. Without avoiding the question, we developed strategies for directing it appropriately. Fortunately, I did not experience any other problems with the research questions. The research questions were as follows:

1. What is the ICT infrastructure of SfH?
2. How do the administrators, faculty members, and students use ICT in the teaching-learning process at the SfH?
3. According to the administrators, faculty members and students, what are the working aspects in the ICT integration process at the SfH?
4. According to the administrators, faculty members and students, what are the barriers in the ICT integration process at the SfH?
5. According to the administrators, faculty members and students, what are the solutions suggested to the barriers encountered in the ICT integration process at the SfH?

### **Issues of the Research Design**

Successful ICT application depends on the context and conditions of the educational institution. For a change or improvement in the system of the school, all the factors brought by each participant into the process should be determined and examined in terms of their interactions with each other (Usluel, Mumcu, & Demiraslan, 2007). Case study methodology is a comprehensive examination of a case, event or groups (Yin, 1998). Case studies investigating the ICT integration process in educational institutions whether it was for hearing-impaired students or for standard-hearing students allow for a comprehensive collection of data from multiple sources. Case studies make it possible to fully understand the ICT integration process of an educational institution by examining all the participants through either interviews or observations, by determining the related needs in detail, and by providing supportive data through document analysis (Bogdan & Biklen, 2007; Tellis, 1997; Yin, 1998). Also, in Turkey there are no studies to date that examine the ICT integration process of a higher education institution for hearing impaired students using a qualitative case study approach.

### **The Collection and Analysis of Data**

#### **Data Collection Issues**

Since the purpose of a case study is to examine the participating individuals, programs or the process deeply, case studies include an intensive process of collecting the research data (Merriam, 1998) via a number of sources (Creswell, 2005). In case studies,

the research data can be collected by using different data collection techniques such as documents, archival data, interviews, direct observation, participant observation and artifacts (Becker et al., 2005; Stake, 2000; Yin, 1998). In this case study, the research data were collected through participant observations, six semi-structured interviews, seventy-seven open-ended questionnaires, the researcher's journal, documents and archival records. In order to reveal the views of the administrators who participated in the study, a semi-structured interview form was used, while an open-ended questionnaire form was used to reveal the perspectives of the other participants (the faculty members and the students). There were several advantages and disadvantages of data collection in the SfH as an insider-researcher.

**Advantages.** Many advantages of being an insider-researcher have been discussed in the literature. Speaking the same insider language, understanding the local values, knowledge and taboos, knowing the formal and informal power structure, and obtaining permission to conduct the research, to interview, and to get access to records, and documents easily facilitate the research process (Coghlan, 2003; Herrmann, 1989; Rouney, 2005; Tedlock, 2000).

For my research project, I made good use of these advantages in collecting the data. I could collect the research data every day of the week at any time of the day, which an outsider might not have achieved. This provided continuity for the collection of the research data. The continuity of data collection made it possible to collect more detailed and more versatile, and thus more trustworthy, research data.

The administrators and the faculty, who participated in the data collection process, were also my colleagues. Thus, during the data collection process, my requests were almost never rejected by the members of the school, which an outsider in such a study might have experienced. For example, when I wanted to learn the ICT infrastructure of SfH from the beginning by document analysis, the principal of the SfH gave the related documents spontaneously, without filling out any official documents (Researcher's Journal, p. 9). In addition, when I went to my colleagues' offices to give information about the survey prepared for them, my peers reacted positively to my requests (Researcher's Journal, p. 38). Interviews and lesson observations were planned and arranged easily with my colleagues. (Researcher's Journal, pp. 13, 18, 79, 118).

All the administrators showed respect for my research and me by sharing their time and knowledge with me (Researcher's Journal, p. 18). My peers gave importance to the study by sharing information and allocated time for this project on a voluntary basis (Researcher's Journal, pp. 45, 65). For example, as some of them completed the surveys via the Internet, they communicated with me to make sure that I had received them. They said that I was welcome to ask them further questions for my research. (Researcher's Journal, pp. 60, 69).

In addition, I could easily complete the missing data. For example, after finishing the interviews with administrators, I could easily ask them clarification questions, whether it was in their office or just in the corridor of the SfH. This enhances trustworthiness as well (Researcher's Journal, p. 19).

I had spontaneous conversations with my peers. Many of the instructors expressed their willingness to be observed in their classrooms in these conversations (Researcher's Journal, p. 65, 68, 69, 71, 76, 92, 100). These spontaneous conversations enriched the

data. For example, when I asked a faculty member in a spontaneous conversation what other problems he encountered while using ICTs in order to clarify his earlier response to the question in the questionnaires, the faculty member stated, “*I sometimes experience technical problems.*” The faculty member stated he solved the technical problems in the lesson on his own (Researcher’s Journal, p. 45).

The fact that the participants were able to reach me due to my insider status provided the faculty members with the opportunity to consult me regarding the points they did not understand. For instance, in a spontaneous conversation I held with one of the faculty members on December 19, 2007 in the school corridor, the faculty member stated that he did not fully complete the questionnaire and that there were some points that he did not understand. He asked, “*What do you mean by saying information and communication technologies?*” Thus, I made some non-interventional explanations for him. For this purpose, I said, “*I want to learn what information and communication technologies mean for you; then, you can write down what such technologies mean for you*” (Researcher’s Journal, p. 44).

Knowing the personality of participants facilitated the interactions between us. For example, I was relieved to hear that one faculty member who was hesitant about being observed during the lesson stated that her hesitation was not due to her disbelief in me as a researcher but due to her own character (Researcher’s Journal, p. 39).

Knowing what was happening in the SfH as an insider helped me to give meaning to implicit messages and provide clarification. For example, an instructor implicitly mentioned a datashow problem. As an insider, knowing the source of the problem I could easily understand the situation without asking any clarification question (Researcher’s Journal, p. 44).

The students did not appear to be affected by my presence in the classroom. I think they were used to being videotaped in and out of the classroom within the scope of ongoing research projects occurring in the SfH. I was also an instructor of many of the students. Confirming this situation, the faculty members whose courses were videotaped stated, “*... it was quite natural that they were not influenced (because the researcher was their instructor)*” (Researcher’s journal, p. 62). In this way, I managed to collect more valid data.

**Disadvantages.** On the other hand, while collecting the data there were some disadvantages of being in the insider position (Hermann, 1989; Rooney, 2000; Sikes & Potts, 2008; Smyth & Holian, 2008), such as:

- Role duality (instructor/researcher)
- Overlooking certain routine behaviours
- Making assumptions about the meanings of events and not seeking clarification
- Assuming he/she knows participants’ views and issues
- The participants may tend to assume you already know what they know
- Closeness to the situation hindering the researcher from seeing all dimensions of the bigger picture while collecting the data

I tried to overcome some of the disadvantages by taking a preventative approach.



**Role duality.** Before starting my research project I was known simply as an instructor at the SfH. Based on the literature, after being informed of the nature of the research project administrators, instructors and students may have perceived me not only simply as an instructor but also as a researcher (Burke & Kirton, 2006; Herrmann, 1989). In any insider research if the researcher does not take serious precautions to prevent this issue, the researcher's needs, critical to the study, may not be met (Hermann, 1989). As I mentioned before, I was an accepted person by the faculty members, and the administrators because of past experiences (Researcher's Journal, p. 20). Therefore, I did not have difficulty in expressing my role as a researcher to the faculty members. In addition, during the research process, in order to maintain the systematic continuity of the research, to provide the researcher with directive information, to discuss the current situations and to establish cooperation between the participants, a "Trustworthiness Committee" including myself and my dissertation advisors was established. While one of them was an educational technology expert, the other was an expert on qualitative research methods and education of hearing-impaired individuals. The first member of the committee acted as an outsider that tried to make sense of the data by asking "the real questions", whereas the second member of the committee acted as a key informant (Researcher's Journal, pp. 9, 12, 18, 25). The key informant, as an insider, knew the participants in SfH, especially the principal. She was more acquainted with the organization and the history of the school compared to me. She was an accepted and respected person in the SfH. Furthermore, she knew my capability as a researcher and believed that I would be accepted in the school. With all these properties of the key informant I was sure of a great chance of success throughout the whole research process.

In addition, I did not reveal any observations that I made with any participants. Instead, I wrote my feelings, impressions and thoughts in my research journal and shared them only with my advisors. This ensured participants' trust in me during the research process and I did not lose any valuable qualitative data.

Various academic research projects are supported in SfH because SfH is a higher education institution. SfH was established with the support of a United Nations Project and many research studies have been conducted in SfH. As such the instructors also have insider-researcher roles in many of the research projects. These characteristics of the SfH positively affected my ability to express my role as a researcher.

**Overlooking certain routine behaviours.** All the situations experienced during the data collection were shared with the Trustworthiness Committee. As I mentioned before, the key informant provided guidance and oversaw the qualitative data collection and analysis. As a novice researcher with her guidance, I would say that I have gradually gained insight into being an insider-researcher and collected valid data. I realized which data were important enough to be collected (Researcher's Journal, p. 49). In this way, after learning which data were the most important for my research, I decided on what to include in my research report. The data collection process was successfully completed thanks to the fact that the key informant knew people in the environment, that she was more familiar with the school organization and its history than the researcher, and that she was viewed in a favorable light by school administrators and teachers. Since she had experience conducting research within the school, she was well-equipped to assist me with implementing the project (Researcher's Journal, p. 25).

*The participants may tend to assume you already know what they know.* After collecting several data, I realized that we needed more information to make sense of the whole picture. For instance, I had opportunities to obtain more information with the clarification questions by conducting additional interviews and doing classroom observations. I wanted as much extra information in interviews from the participants as possible. I gave them the opportunity to reflect on their perspectives with clarification questions (Researcher's Journal, pp. 2, 23).

**Bias.** In order to see all the dimensions of the bigger picture, I confronted my own blindspots. I collected the research data without prejudice as much as I could. One practical step to minimize the impact of biases is to enlist the help of an external academic advisor (Rooney, 2005). Being experienced in educational technology but not a member of the SfH, the first member of the Trustworthiness Committee gave outsider perspectives. And thus the research was guided with her invaluable contribution. During the research, I tried to minimize my biases by trying hard to consider my research within the current social circumstance and by clarifying the research process and the researcher role while writing the research report.

### **Analyzing the Data**

The literature recommends that the more a researcher overcomes his/her bias as an insider, the more he/she is able to come up with rich theme (Smyth & Holian, 2008). The Trustworthiness Committee and Anadolu University Committee reports allowed me to overcome my biases about my research data. Because my reports were evaluated based on the evidence-based criteria established by this committee, I gradually gained the skills for interpreting my data without bias. Multiple sources of data and methods of data collection, keeping a researcher's journal as an audit trail, sharing and checking the interpretations with the informants and detailed description of the research setting and research participants also maximized the research rigor (Becker et al., 2005; GAO [United States General Accounting Office, Program Evaluation and Methodology Division], 1990; Patton, 2002; Smyth & Holian, 2008).

### **Ethical Issues**

I did consider all the ethical issues such as honesty, privacy, responsibility and fair share, which are inseparable from any research effort. I took certain precautions required by the design of a case study. In case studies, the researcher tries to understand the current research subject without intervening except through data collection. Therefore, in my study, I tried hard not to interfere with the subjects related to ICT use except for the courses I taught within the institution. In addition, I tried not to affect subjects' responses related to ICT use. To illustrate, I did not share such things with the deputy director, like what one of the faculty members said regarding the preparation of the laboratories for the lessons by the technician. I did nothing about this because I expected the faculty member to talk about this situation on her own (Researcher's Journal, p. 30).

In addition, as I was considered to be a computer expert, I tried to avoid providing instant solutions to technical problems (Researcher's Journal, p. 35). Except for my courses in SfH, I just observed the happenings instead of interfering with ICT-related subjects (Researcher's Journal, p. 46). I tried to avoid resolving with the complaints of students regarding ICTs (Researcher's Journal, p. 63). Moreover, at a meeting held on the self-evaluation of the SfH, I just listened to the faculty members and the directors regarding the level of technology use in the teaching process (Researcher's Journal, p. 64). I did not interfere with anything in my own courses in order not to impede on the students' right to learn. For instance, regarding a technical problem experienced in my own lesson on the December 30, 2007, I helped solve the problem just by talking to the technician about the problem. I tried not to interfere with any issues regarding the use of ICT in the institution, but I had mixed feelings as an instructor. My students had the right to have lessons and an educational program that ICT integrated. It was a dilemma! Informing my research committee of the interference, I regulated my classes. Other than my courses, I never interfered with any situation regarding the use of ICT in the school during the research process.

### **Reporting the Data**

When you are an insider conducting a case study, data gathering is not restricted to just classroom observations. When the research area is simultaneously your place of employment, you may come across some private cases perhaps an outsider would not. While this presented valuable data, it posed dilemmas. Having free access to insider secrets may bother the researcher and may cause difficulties while writing the final document.

Therefore, on the one hand, as a researcher, I was determined not to play down certain aspects of my findings when I discussed them and, on the other, as an instructor within the same school, I knew I had responsibilities to the school and to my colleagues. From the start of my project I had to take into account possible ways in which my research findings were going to be used. I had to omit sensitive information. However, I could still refer to this information within the school. I could refer to it during staff meetings and some action research projects, although after the final report, sometime in the future.

### **Conclusion**

In the literature, researchers have different ideas of the validity of insider-outsider research. Some of the researchers argue that outsiders cannot produce a valuable research perspective (Lewis, 1973). On the other hand, Schuetz (1944), like Wolff (1950), underlines the ways in which the stranger is more easily able to critically observe events and situations which the insiders may take for granted as unquestionable "truths". From my perspective I believe that each position (insider and outsider) has advantages and disadvantages. There are no overwhelming advantages to being an insider or an outsider. Each position has advantages and disadvantages, though these will take on slightly different weights depending on the particular circumstances and purposes of the research (Hammersley, 1993). Whether the researcher is an outsider or insider, there are various

issues one should pay attention to for valid data. Ethical considerations must be taken into account, with the benefits outweighing the displacement of subjects, setting and researcher.

In this paper, I discussed my experiences from my case study research concerning the advantages and disadvantages of being an insider researcher. As an instructor in the Computer Operator Training Associate Degree Program in the SfH, I was an insider researcher in this case study. Like all insider research, also as in insider case studies, it is crucial to discuss the experienced advantages and attempts to address the disadvantages of being in an insider position, in order to collect valid data.

From my experience, doing case study research as an insider has many advantages in determining the case, entering the research site, defining the researcher's role to participants under study and surviving in the research site. Accessing data is easily done, colleagues may be supportive and helpful, the researcher does not have to go other research areas and the whole school may benefit from the research results. On the other hand, you may encounter some problematic situations in identifying the research questions, considering the ethical issues, bias, role duality and obtaining sensitive information about the personnel or colleagues and not reporting this information in the final report. I coped with these problematic situations in my case study with the help of several preventive suggestions presented above.

I also want to mention that advisors play a critical role in supporting the researchers while conducting insider research. In my study I was fortunate that the relationship with my advisors was fruitful and friendly but at the same time we never lost sight of our professional responsibilities.

In conclusion, I feel that I am fortunate. I experienced many advantages being in an insider position and have overcome the few disadvantages in my research. Now, I have future plans to conduct other studies as an insider. Using the recommendations above, future insider case study researchers can avoid the above issues in order to get valid insider research.

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### Appendix A

1. According to you, what are information and communication technology? And what does ICT comprise?
  - a. What can be done to get information?
  - b. What can be done to ensure communication?
2. Which information and communication technology in school life are you using? For what purposes do you use information and communication technology in school life?
  - a. For what purposes do you use it in the class?
  - b. For what purposes do you use it out of the class?
3. How do you use information and communication technologies? Could you tell us the process?
  - a. How do you use it in the teaching-learning process?
  - b. How do you use it outside of the teaching-learning process?
4. According to you, what are the working aspects of using ICTs in and out of the teaching and learning process?
5. What problems do you experience while using information and communication technology?
6. How do you cope with these problems?
7. What kind of educational needs do you have for the use of information and communication technology?

- a. What kind of activities can be done for the effective use of information and communication technology?

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### **Authors Note**

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I would like to acknowledge the support of Professor Dr. Yildiz Uzuner and Assistant Professor Dr. Isil Kabakci in the development of this research and this paper.

This study is a part of a doctoral thesis numbered 070538 Project, supported by Anadolu University Scientific Research Projects and is an extended version of the oral presentation presented at the 10<sup>th</sup> Advances in Qualitative Methods Conference.

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### **Article Citation**

Unluer, S. (2012). Being an insider researcher while conducting case study research. *The Qualitative Report*, 17(Art. 58), 1-14. Retrieved from <http://www.nova.edu/ssss/QR/QR17/unluer.pdf>

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