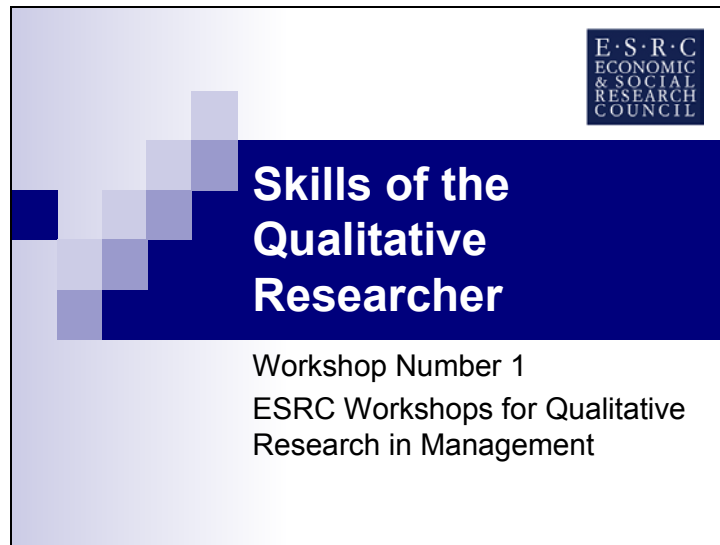


Slide 1



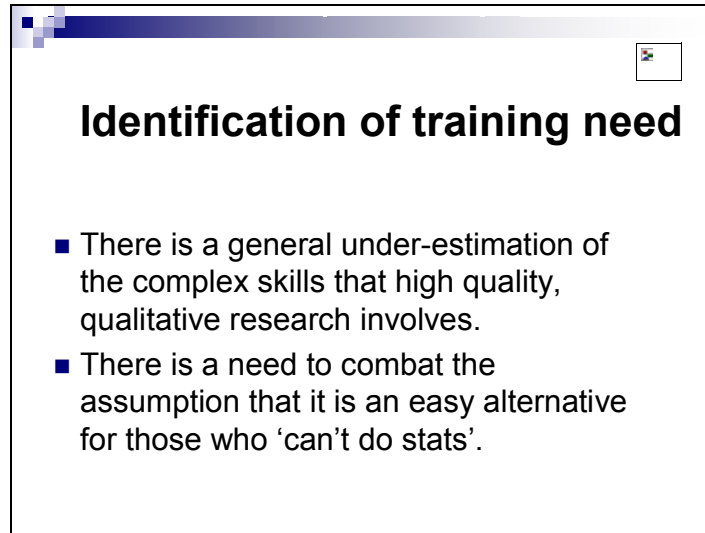
## **Skills of the Qualitative Researcher: The Facilitator's Guide**

**Pre-reading:** N/A

**Handouts:** List of Training Workshops

**Target audience:** PhD Students

**Any thing else to note?** N/A



The slide features a blue gradient header bar at the top. Below the header, the title 'Identification of training need' is centered in a bold, black font. Underneath the title, there are two bullet points, each preceded by a small blue square. The first bullet point discusses the under-estimation of complex skills in qualitative research, and the second discusses the need to combat the assumption that qualitative research is an easy alternative for those who 'can't do stats'.

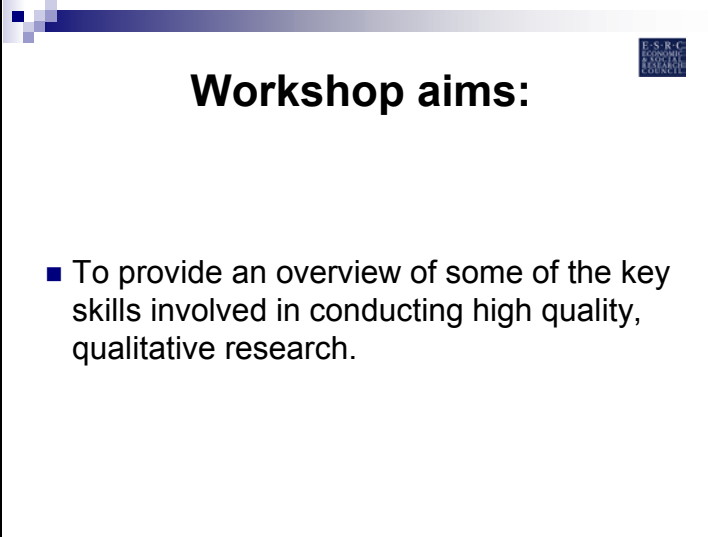
### Identification of training need

- There is a general under-estimation of the complex skills that high quality, qualitative research involves.
- There is a need to combat the assumption that it is an easy alternative for those who 'can't do stats'.

**Additional Comments:**

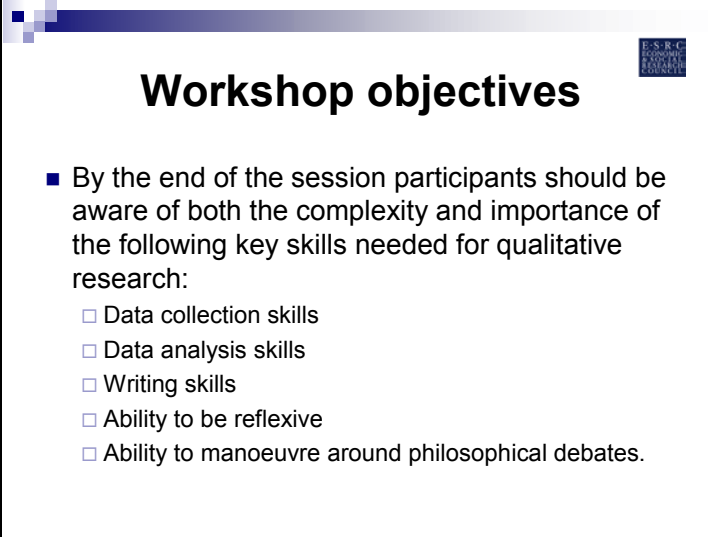
A result of the misapprehension that qualitative research is easy, is a perception of qualitative research as lower and less significant than quantitative research. To help rectify this problem, this workshop aims to provide an overview of the complex skills required for qualitative research.

This training need was identified in the accompanying study carried out by Cassell et al 2005 entitled 'Benchmarking Good Practice in Qualitative Research'. >>

A presentation slide with a white background and a black border. At the top left, there is a decorative graphic of a blue and white grid. At the top right, there is a small blue square logo with the text 'E.S.R.C. ECONOMIC SOCIETY RESEARCH PROGRAM' in white. The main title 'Workshop aims:' is centered in a bold black font. Below the title, there is a single bullet point with a blue square marker, stating: 'To provide an overview of some of the key skills involved in conducting high quality, qualitative research.'

**Additional Comments:**

The term qualitative research is understood differently by individual researchers (for further details see Cassell et al 2005) therefore a definite characterization will not be given here, rather we use it as a broad umbrella term to cover accepted practice within the research community. This workshop does not aim to list categorically every research skill needed for all types of qualitative research but aims to explore a few 'core' skills commonly required in quality qualitative research.

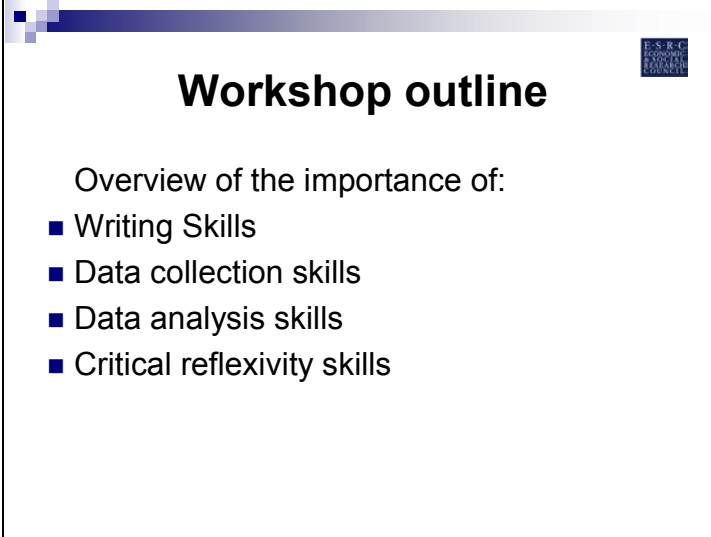
The slide features a blue gradient header bar at the top. On the right side of the header, there is a small logo for the Economic Research Forum. The main title 'Workshop objectives' is centered in a bold, black font. Below the title, a bulleted list outlines the workshop's goals, starting with a square bullet point and followed by a list of five skills, each preceded by a square checkbox.

**Workshop objectives**

- By the end of the session participants should be aware of both the complexity and importance of the following key skills needed for qualitative research:
  - Data collection skills
  - Data analysis skills
  - Writing skills
  - Ability to be reflexive
  - Ability to manoeuvre around philosophical debates.

**Additional Comments:**

Although these skills may also be needed in quantitative research, they will be discussed in relation to qualitative research. Within quantitative research, the first three skills are often seen as highly technical and complex because of their use in relation to statistics. However, this workshop aims to show that qualitative research also necessitates complex and specialised use of these skills.

A presentation slide titled "Workshop outline" with a blue header bar and a small logo in the top right corner. The slide lists an overview of the importance of four skills: Writing Skills, Data collection skills, Data analysis skills, and Critical reflexivity skills.

**Workshop outline**

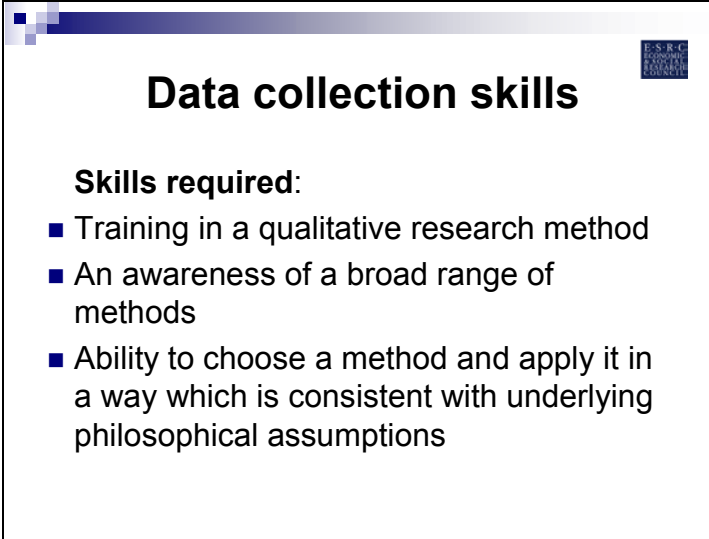
Overview of the importance of:

- Writing Skills
- Data collection skills
- Data analysis skills
- Critical reflexivity skills

**Additional Comments:**

Point out that although these have been listed separately for ease of reference/understanding, in reality these are not entirely separate but overlap and interlink with each other.

Qualitative researchers also need a thorough awareness of the philosophical assumptions underpinning their research. Although quantitative researchers should also have such a meticulous understanding, in practice their underlying philosophical assumptions are often seen as the default choice and are left unchallenged. It is therefore often only qualitative researchers that are pushed to defend their philosophical beliefs. The ability to manoeuvre around philosophical debates is therefore a skill which pervades the research process at every stage. Thus this skill will not be considered separately but will be investigated as part of the other skills.



## Data collection skills

**Skills required:**

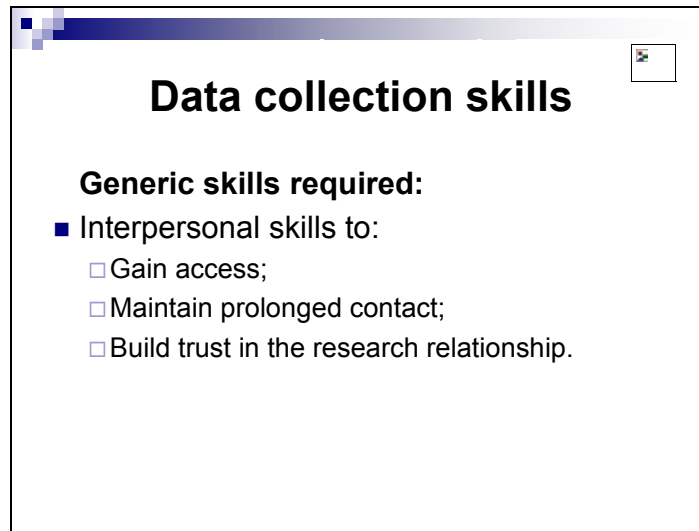
- Training in a qualitative research method
- An awareness of a broad range of methods
- Ability to choose a method and apply it in a way which is consistent with underlying philosophical assumptions

**Additional Comments:**

Data collection requires training in a specific qualitative research method, as well as an awareness of a broad range of methods in order to make an informed selection. There are a vast number of qualitative research methods—more than is possible to cover in depth today. Instead of going through each method and examining the specific skills in each, this workshop will explore a range of generic skills needed for much of qualitative data collection whilst signposting further information on research methods at the end. For more on qualitative methods please see Workshop Number 4: Range of Qualitative Methods. >>

Although qualitative research requires a choice of method which is also consistent with its philosophical assumptions, the underlying view of reality here is frequently taken for granted as the ‘default choice’ unless stated otherwise. Qualitative researchers on the other hand are often pushed to defend their epistemological assumptions and the consistency with their method. Therefore researchers will need a thorough understanding of the

position that they take on ontology and epistemology and the ability to defend it (although quantitative researchers should also have this understanding).



## Data collection skills

**Generic skills required:**

- Interpersonal skills to:
  - Gain access;
  - Maintain prolonged contact;
  - Build trust in the research relationship.

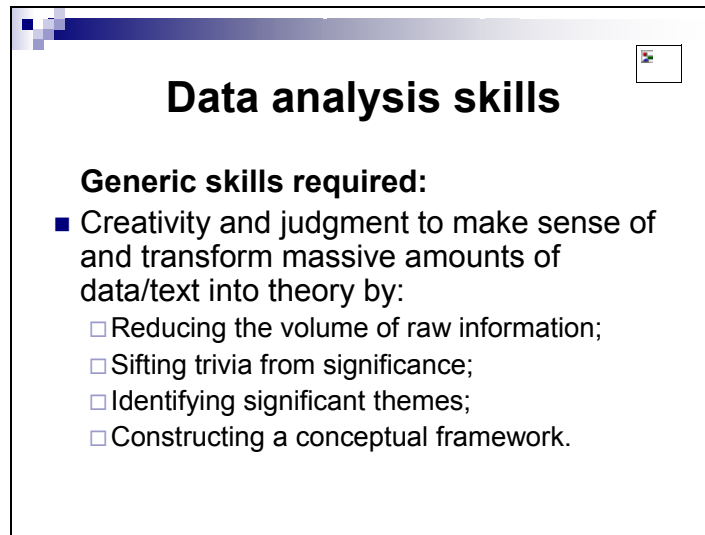
**Additional Comments:**

When collecting empirical data, the subjective nature of this method means that researchers will need various interpersonal skills to manage the research process starting from gaining access. Taylor and Bogdan (1984: 20) explain that in order to get access it is important to project the right image, convince gate keepers you are non-threatening and give a 'vague and imprecise' summary of the research procedures and objectives in order to reduce the risk of defensive or self-conscious behavior (Waddington 1994).

Once the researcher has gained access they must continue to use these skills to concentrate on maintaining prolonged contact. They need to continue to project a non-threatening image whilst building up trust. The richest data can be obtained when the relationship between the participant and the researcher is one of trust and rapport, and the latter feels able to express themselves fully and is able to describe their feelings and views, rather than giving brief, socially-acceptable answers. According to Fetterman (1986:89) the researcher should be 'courteous polite and respectful' and should avoid uninvited displays of friendliness and familiarity (1991:89). Therefore the



qualitative researcher needs to be particularly skillful in building and maintaining a research relationship. Taylor and Bogdan (1984) emphasise that they should try to highlight whatever feature they have in common with their respondents, act interested in respondents' views and try to help people wherever possible.



## Data analysis skills

**Generic skills required:**

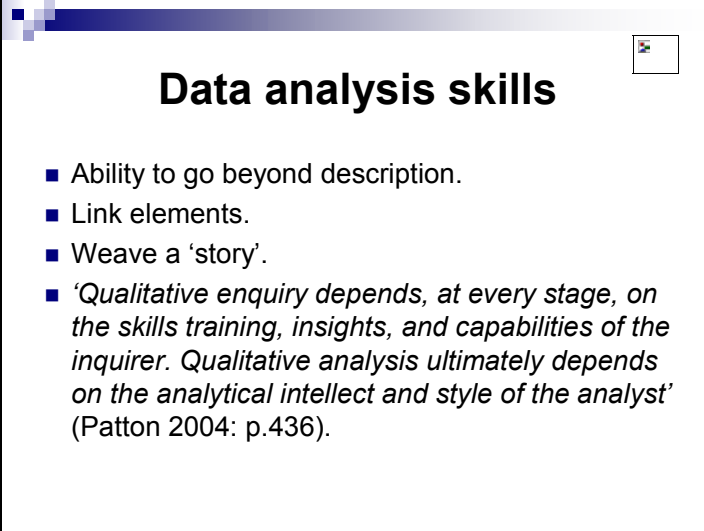
- Creativity and judgment to make sense of and transform massive amounts of data/text into theory by:
  - Reducing the volume of raw information;
  - Sifting trivia from significance;
  - Identifying significant themes;
  - Constructing a conceptual framework.

**Additional Comments:**

There are a considerable amount of approaches to qualitative research. Exploration of each of these approaches is beyond the scope of this workshop, but the broad generic skills which are needed in all qualitative analysis will be covered.

Qualitative research analysis requires the researcher to make sense of and transform massive amounts of data, which can be both textual and visual. Qualitative data comes in the form of words or visual images rather than numbers and the issue is therefore to move these words into theory via data/text analysis. This involves reducing the volume of raw information, sifting trivia from significance, identifying significant themes and constructing a conceptual framework (Patton 2002: 432).

However whilst there may be guidance, unlike much of quantitative research there are no hard and fast rules or formula for qualitative analysis. Applying guidelines requires judgment and creativity and this means that qualitative research needs considerable skill in transforming data into theory.

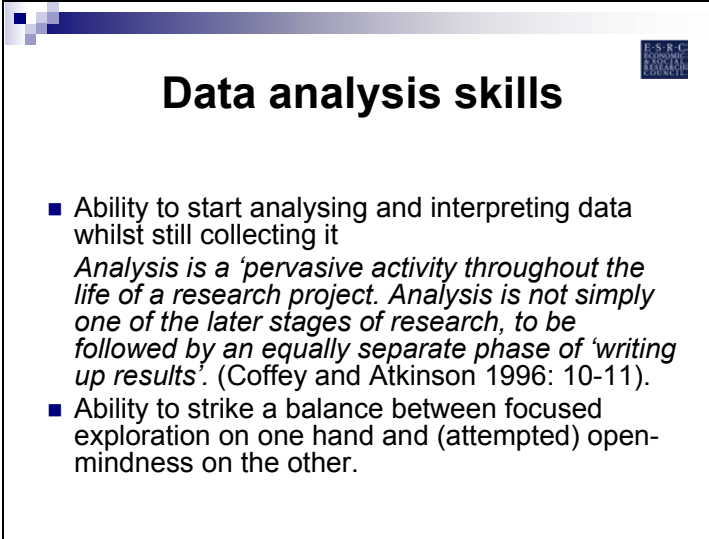


## Data analysis skills

- Ability to go beyond description.
- Link elements.
- Weave a 'story'.
- *'Qualitative enquiry depends, at every stage, on the skills training, insights, and capabilities of the inquirer. Qualitative analysis ultimately depends on the analytical intellect and style of the analyst'* (Patton 2004: p.436).

**Additional Comments:**

Miles and Huberman (1984) demonstrate that in field studies, unlike much quantitative research, we are not satisfied by a simple description of the data. The coding of data is only the first stage and the researcher will require considerable skill in linking these elements together, weaving a story. Qualitative analysis therefore depends on the analytical intellect and style of the analyst.



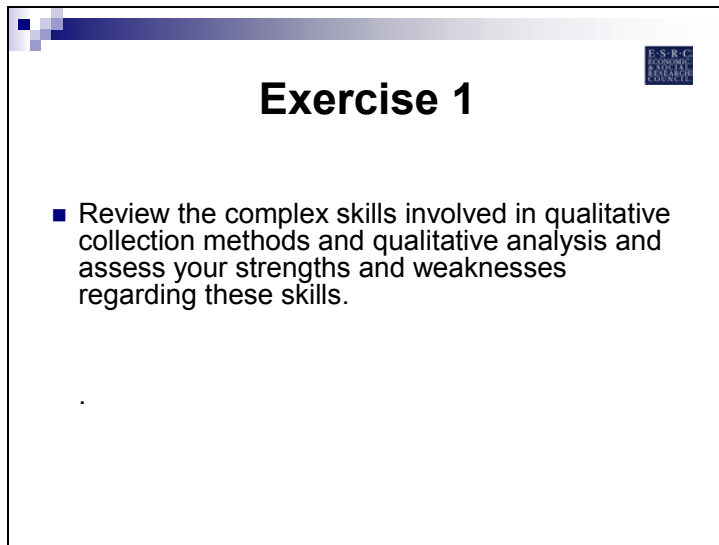
**Data analysis skills**

- Ability to start analysing and interpreting data whilst still collecting it  
*Analysis is a 'pervasive activity throughout the life of a research project. Analysis is not simply one of the later stages of research, to be followed by an equally separate phase of 'writing up results'. (Coffey and Atkinson 1996: 10-11).*
- Ability to strike a balance between focused exploration on one hand and (attempted) open-mindedness on the other.

**Additional Comments:**

Researchers need to be able to start analysing and interpreting their data whilst still collecting it. Although research designs which gather data prior to analysing it may be appropriate in quantitative studies (which are more concerned with implementing pre-designed measures than with employing a theoretical imagination) in qualitative studies the researcher needs to be analysing from day one of data collection (Silverman 2000).

Simultaneously collecting data and analysing the findings require the researcher to strike a balance between focused exploration on one hand and (attempted) open-mindedness on the other.

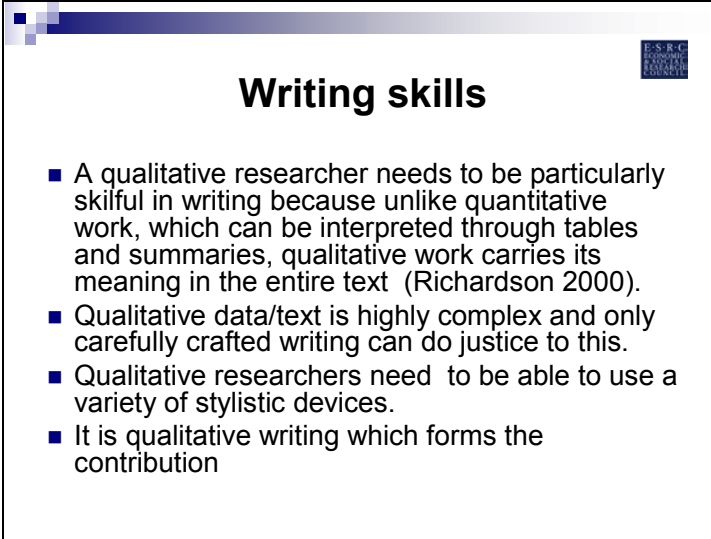


## Exercise 1

- Review the complex skills involved in qualitative collection methods and qualitative analysis and assess your strengths and weaknesses regarding these skills.

**Additional Comments:**

Participants will benefit most if this exercise is done on their own to allow them to be completely honest.



## Writing skills

- A qualitative researcher needs to be particularly skilful in writing because unlike quantitative work, which can be interpreted through tables and summaries, qualitative work carries its meaning in the entire text (Richardson 2000).
- Qualitative data/text is highly complex and only carefully crafted writing can do justice to this.
- Qualitative researchers need to be able to use a variety of stylistic devices.
- It is qualitative writing which forms the contribution

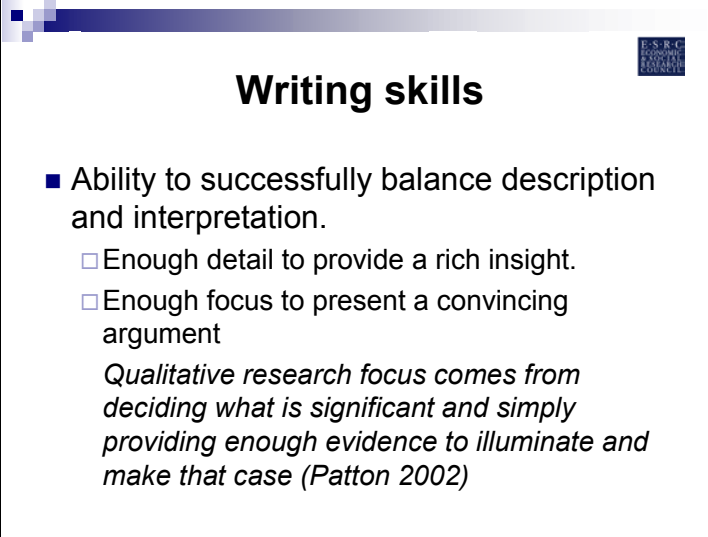
**Additional Comments:**

A qualitative researcher needs to be particularly skilful in writing, because it is on the persuasiveness of a researcher's written argument that the reader bases their decisions and judgments about the matter in question.

There is no set rhetorical form – such as in more 'scientific' objective writing (which uses aspects of style such as impersonal pronouns, passive voice) but writers tend to rely on a range of creative stylistic devices such as vivid description and poetic language to hold readers attention- this goes back to the above point that the meaning is expressed in the text and so writing is very important.

Golden-Biddle and Locke (1997) point out that transforming qualitative data into written contextual form concerns much more than the rational presentation of the data. They argue that the major task of writing up research involves figuring a 'story' that makes contextually grounded theoretical points that are viewed as a contribution by the relevant professional community of readers. Loseke and Cahill (2001) point out that potentially insightful and

important manuscripts may be rejected because editors and reviewers find their prose too incomprehensible or just too painful to read.



**Writing skills**

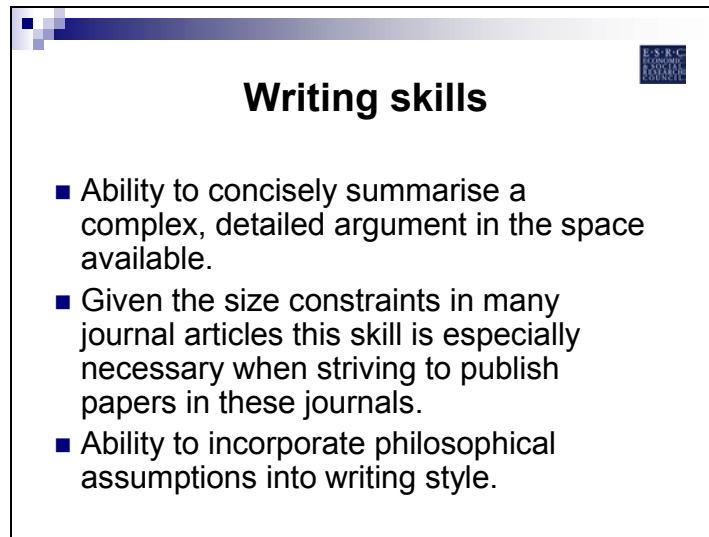
- Ability to successfully balance description and interpretation.
  - Enough detail to provide a rich insight.
  - Enough focus to present a convincing argument

*Qualitative research focus comes from deciding what is significant and simply providing enough evidence to illuminate and make that case (Patton 2002)*

**Additional Comments:**

When striving to create a convincing argument, the qualitative researcher needs to be skilled in finding the balance between the amount of description and amount of interpretation. Description should be detailed enough to present context and emotion. Well written qualitative studies share the capacity to open up a world to the reader through rich, detailed, and concrete descriptions of people and places in such a way that we can understand the phenomena studied and draw our own interpretations. Some writers label this “thick description” (Denzin and Lincoln 2000, Patton 2002). However, description should stop short of detailing the trivial and mundane, causing the research to lose focus and strength of argument. Qualitative research focus comes from deciding what is significant and simply providing enough evidence to illuminate and make that case (Patton 2002). Therefore the researcher needs to be skilled in finding the balance between description, analysis and interpretation.





### Writing skills

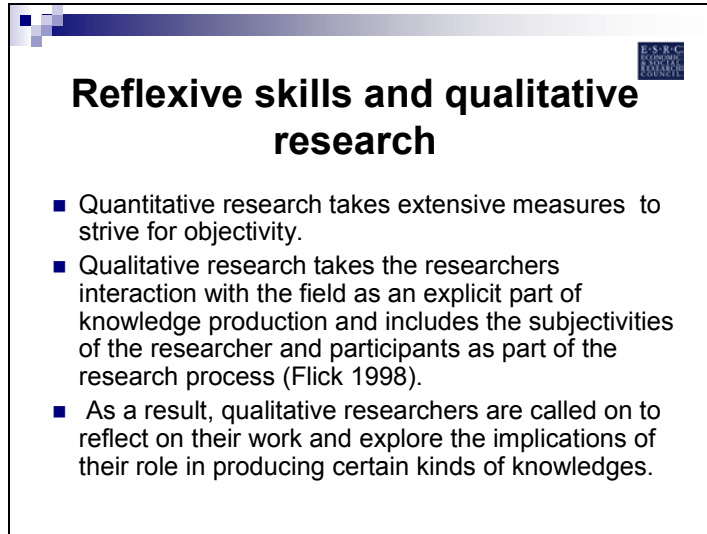
- Ability to concisely summarise a complex, detailed argument in the space available.
- Given the size constraints in many journal articles this skill is especially necessary when striving to publish papers in these journals.
- Ability to incorporate philosophical assumptions into writing style.

**Additional Comments:**

Linked in with the need for balance between description and analysis is the qualitative researchers skill in concisely yet persuasively constructing an argument. Given the volume of data involved in qualitative inquiry and the limited space available, the qualitative researcher needs to be skilful in summarising an argument. This skill is especially necessary when striving to publish papers in journals with size constraints. (For information on selecting relevant journals for submission see Workshop Number 6: Writing and Publishing Skills). >>

When seeking to be published we need to establish the author as 'credible' to the readers (including reviewers, editors and other colleagues in the discipline). One of the ways this has traditionally been achieved is through the use of the 'objective', passive scientific style. However, unlike quantitative writing, where writing conventions are taken for granted, the qualitative researcher is also required to skillfully manoeuvre around philosophical debates even in the process of writing. Conveying independence from data creates a special issue for qualitative researchers because we have entered the field and relied on ourselves as the major data collection instruments, intentionally using a methodology that enhances involvement with the

phenomena studied (Golden-Biddle Locke 1997). Writers who take a more interpretive stance based on more subjectivist assumptions argue that we are unable to see the phenomena studied objectively and so to convey this through 'objective' style language is false. Some qualitative writing therefore puts the researcher into the writing, for example using personal pronouns such as 'I' and 'we'. Qualitative researchers need to engage with these issues and interweave their philosophical assumptions in their writings. Golden-Biddle and Locke point out that authors can never choose to vanish completely from their texts, they can only pick the disguise in which they will appear.

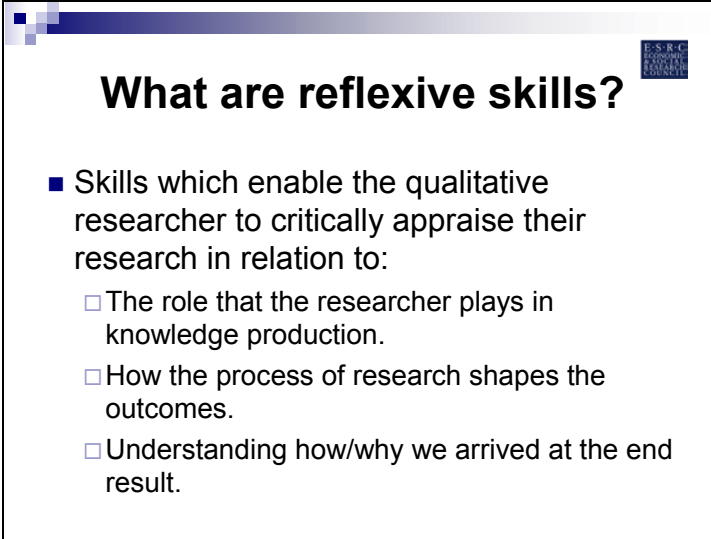


### Reflexive skills and qualitative research

- Quantitative research takes extensive measures to strive for objectivity.
- Qualitative research takes the researchers' interaction with the field as an explicit part of knowledge production and includes the subjectivities of the researcher and participants as part of the research process (Flick 1998).
- As a result, qualitative researchers are called on to reflect on their work and explore the implications of their role in producing certain kinds of knowledges.

**Additional Comments:**

Point out that although this is a skill of paramount importance in qualitative research, no approach should be immune from considering its origins, commitments and impacts.

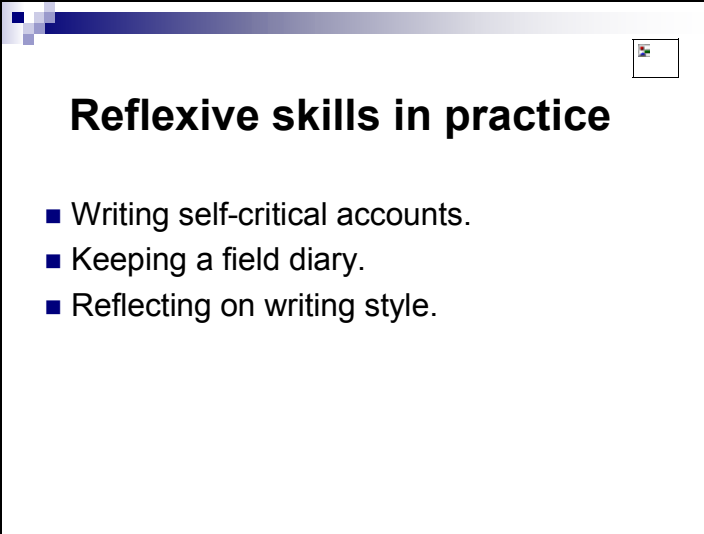


## What are reflexive skills?

- Skills which enable the qualitative researcher to critically appraise their research in relation to:
  - The role that the researcher plays in knowledge production.
  - How the process of research shapes the outcomes.
  - Understanding how/why we arrived at the end result.

**Additional Comments:**

Point out that what constitutes reflexivity is perceived differently by different individuals and that the purpose of this slide is to give a general idea/outline of the reflexive tools needed, not give a definition of reflexivity. For more information on definitions of reflexivity and reflexivity in general, see our Workshop Number 3: Reflexivity. >>



## Reflexive skills in practice

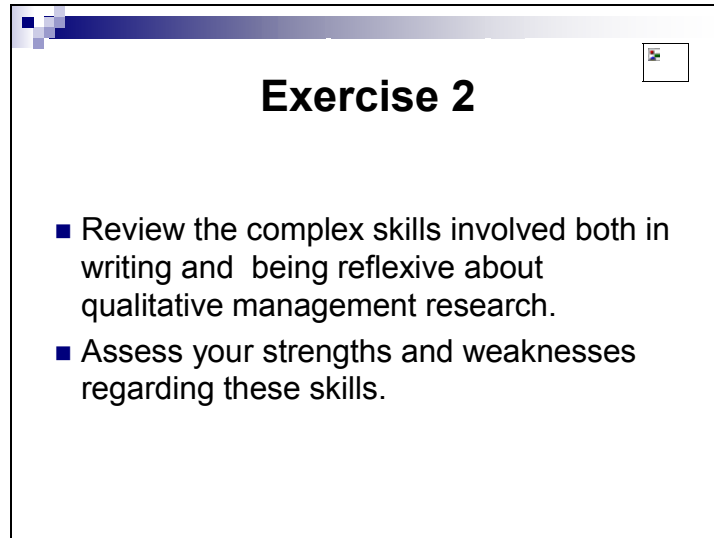
- Writing self-critical accounts.
- Keeping a field diary.
- Reflecting on writing style.

**Additional Comments:**

In these accounts researchers acknowledge that their research does not simply comment on some aspect of the world but is in some way involved in that world. It explores the researcher's position in the world as well as their perceptions and predispositions and the possible impact on the research.

Field diaries can be part of the process of critical self reflection and can note the researchers' biases, theoretical predispositions and preferences in personal notes. The researcher critically inspects the entire research process, including reflecting on the ways in which field workers establish a social network of informants and participants in a study and examining their personal and theoretical commitments to determine how they serve as resources for generating both general and particular interpretations (Schwandt 2001).

Reflecting on their role in their research, the researcher must engage with debates around whether to deviate from the scientific writing conventions and put him/herself in the research (for more on this see Workshop 6: Writing and Publishing Skills and Workshop 3: Reflexivity). >>



## Exercise 2

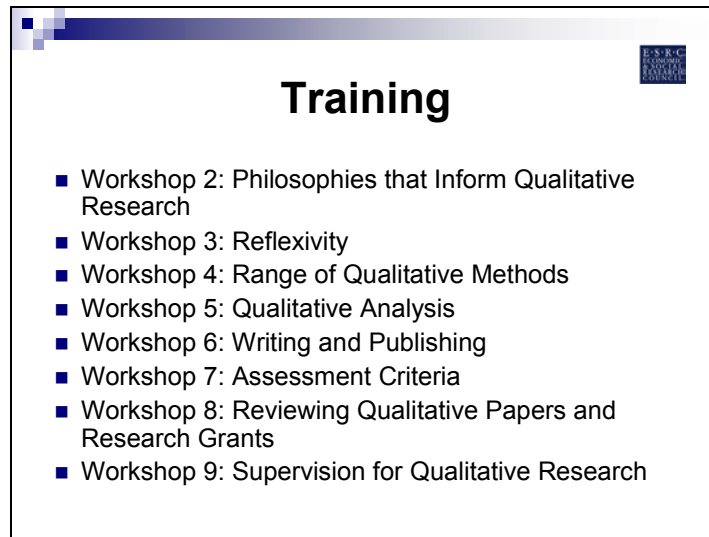
- Review the complex skills involved both in writing and being reflexive about qualitative management research.
- Assess your strengths and weaknesses regarding these skills.

**Additional Comments:**

Participants will benefit most if the first part of exercise is done on their own to allow them to be completely honest.

## **How are qualitative research skills learned?**

- 'On the job' through a long apprenticeship.
- This helps develop a kind of maturity which helps produce good qualitative research.
- Training.



The slide is titled "Training" in a large, bold, black font. Below the title is a bulleted list of nine workshops. The list items are: Workshop 2: Philosophies that Inform Qualitative Research; Workshop 3: Reflexivity; Workshop 4: Range of Qualitative Methods; Workshop 5: Qualitative Analysis; Workshop 6: Writing and Publishing; Workshop 7: Assessment Criteria; Workshop 8: Reviewing Qualitative Papers and Research Grants; and Workshop 9: Supervision for Qualitative Research. In the top right corner of the slide, there is a small blue logo for the Economic and Social Research Council (ESRC).

## Training

- Workshop 2: Philosophies that Inform Qualitative Research
- Workshop 3: Reflexivity
- Workshop 4: Range of Qualitative Methods
- Workshop 5: Qualitative Analysis
- Workshop 6: Writing and Publishing
- Workshop 7: Assessment Criteria
- Workshop 8: Reviewing Qualitative Papers and Research Grants
- Workshop 9: Supervision for Qualitative Research

**Additional Comments:**

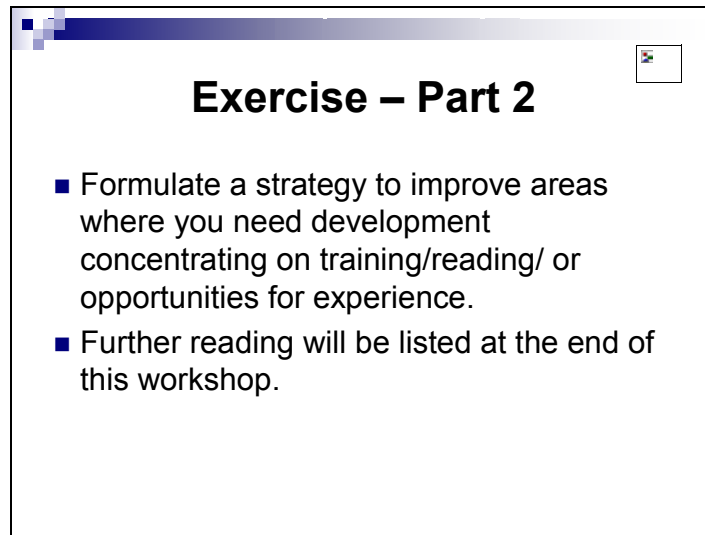
Although qualitative research is often learned largely on the job (training can also play a central role (although as a complement to experience and not a substitute). For further information on the skills outlined here and additional skills for qualitative research see our workshops. >>

Give out handout with list of trainings on.

Each of these workshops addresses particular aspects of the qualitative research experience and will provide a useful source of support for students.

Each workshop also comes with a Facilitator's Guide to allow the supervisor to run the workshop themselves, if they so wish.



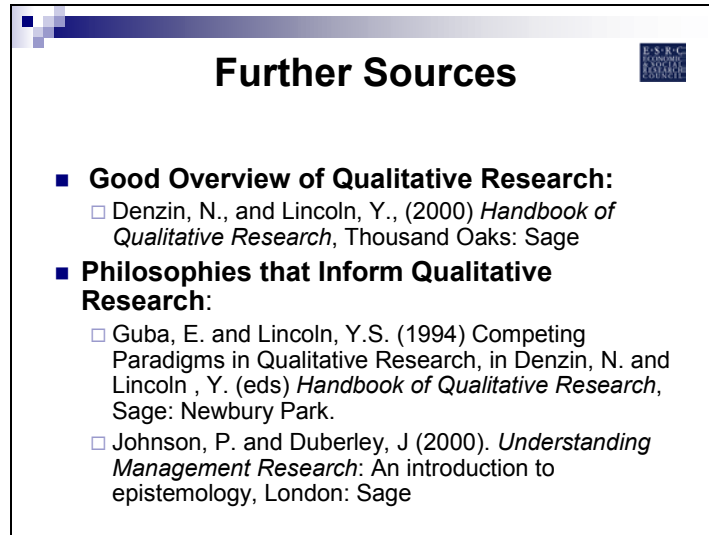


## Exercise – Part 2

- Formulate a strategy to improve areas where you need development concentrating on training/reading/ or opportunities for experience.
- Further reading will be listed at the end of this workshop.

**Additional Comments:**

This exercise can be done in pairs. During this exercise go round to groups and try to offer suggestions which will help them with their strategies. Encourage them to consider whether training, reading or experience will be most beneficial for them (including the idea of a combination of these).





## Further Sources

- **Good Overview of Qualitative Research:**
  - Denzin, N., and Lincoln, Y., (2000) *Handbook of Qualitative Research*, Thousand Oaks: Sage
- **Philosophies that Inform Qualitative Research:**
  - Guba, E. and Lincoln, Y.S. (1994) Competing Paradigms in Qualitative Research, in Denzin, N. and Lincoln, Y. (eds) *Handbook of Qualitative Research*, Sage: Newbury Park.
  - Johnson, P. and Duberley, J (2000). *Understanding Management Research: An introduction to epistemology*, London: Sage

**Additional Comments:**

Equally there also exists a multitude of literature available to help researchers learn about qualitative skills.




## Further Sources

- **Reflexivity**

Finlay, L. (2002) Negotiating the swamp: the opportunity and challenge of reflexivity in research practice. *Qualitative Research*, 2, 209-230.



Johnson, P. and Duberley, J. (2003) Reflexivity in management research. *Journal of Management Studies*, 40, 1279-1303.

Woolgar, S. (ed.) (1988) *Knowledge and Reflexivity*. London: Sage Publications.



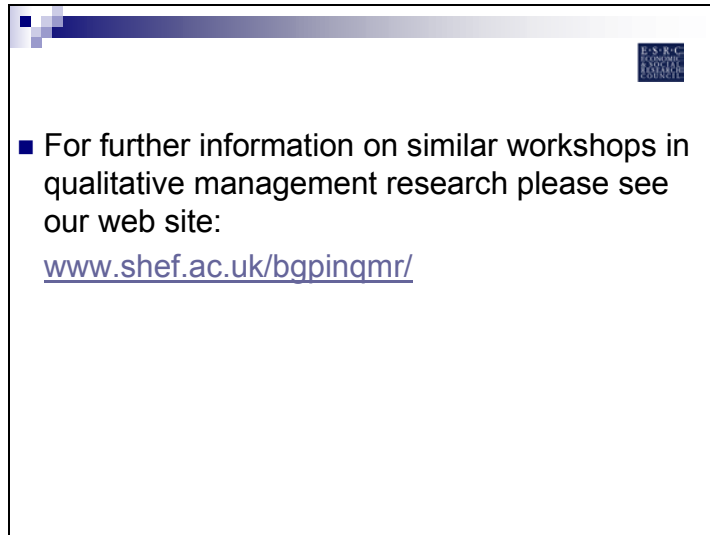
## Further Sources

- **Range of Methods :**
- Cassell, C. and Symon G. (2004) *Essential Guide to Qualitative Methods in Organisational Research*, London: Sage.
- Potter, W. (1996) *An analysis of thinking and researching about qualitative methods*, Mahwah: Erlbaum Associates
- Taylor, S.J. and Bogdan, R. (1984) *Introduction to Qualitative Research Methods: The Search for Meanings* (2nd edn) New York: Wiley.





## Further Sources

- **Analysis:**
  - Dey, I (1993) *Qualitative data analysis: a user friendly guide for social scientists*, London: Routledge.
  - Ryan, G. and Bernard, R. Data Management and Analysis Methods, in Denzin, N., and Lincoln, Y., (2000) *Handbook of Qualitative Research*, Thousand Oaks: Sage
- **Writing and publishing:**
  - Golden-Biddles, K. and Locke, K.. (1997) *Composing Qualitative Research*, California: Sage
  - Wolcott, H., F. (2001) *Writing Up Qualitative Research*, California: Sage



■ For further information on similar workshops in qualitative management research please see our web site:  
[www.shef.ac.uk/bgpinqmr/](http://www.shef.ac.uk/bgpinqmr/)

There is a space on our website for feedback on the training workshops. Please use it to record any feedback including modifications/ adaptations made to the original workshops. >>



## References

- Cassell, C., Buehring, A., Symon, G., Johnson, P., and Bishop, V. (2005) *Benchmarking Good Practice in Qualitative Management Research*. (This report is available on the accompanying resource pack or else can be found on the website: [www.shef.ac.uk/bgpinqmr/](http://www.shef.ac.uk/bgpinqmr/))
- Coffrey, A. and Atkinson, P. (1996) *Making Sense of Qualitative Data*. London: Sage
- Fetterman, D.M. (1991) A Walk through the wilderness: learning to find your way, in W.B. Shaffir and R.A. Stebbins (eds), *Experiencing Fieldwork: an Inside View of Qualitative Research*. Newbury Park, C.A. Sage.
- Lofland, J. (1971) *Analyzing Social Settings: a guide to qualitative observation and analysis*, Belmont: Wadsworth Publishing Co.

## Slide 29



- Loseke, D. and Cahill, S. (2004) Publishing qualitative manuscripts: lessons learned, in Seale, C., Gobo, G., Gubrium, J., and Silverman, D. (eds). *Qualitative Research Practice*, London: Sage.
- Miles, M. B. and Huberman, A. M. (1984) *Qualitative Data Analysis: A Sourcebook of New Methods*, Beverly Hills, CA: Sage.
- Patton, M. (2002) *Qualitative Research and Evaluation Methods*, London: Sage
- Schwandt, T. (2001) *Dictionary of Qualitative Inquiry*, Thousand Oaks: Sage.
- Silverman, D. (2000) *Doing Qualitative Research: A Practical Handbook*, London: Sage.
- Waddington, D. (1994) Participant Observation in Cassell, C. and Symon, G. (eds) *Qualitative Methods in Organisational Research: A Practical Guide*, (eds.) California: Sage.



## **Contents**

Introduction and user instructions

Workshop 1: Skills of the qualitative researcher

Workshop 2: Philosophies that inform qualitative research

Workshop 3: Reflexivity

Workshop 4: Range of qualitative methods

Workshop 5: Qualitative analysis

Workshop 6: Qualitative writing and publishing skills

Workshop 7: Assessment criteria

Workshop 8: Reviewing qualitative papers and research grants

Workshop 9: Supervision for qualitative research