Doing Qualitative Research in Language Education

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Preface

Plant the root of goodness, and seek the path of *tahghigh*. (Hafez)

In Persian, the equivalent for *research* is the word *tahghigh*, which is a rather bookish term. However, there is an interesting instance of the use of this word in everyday life by laypeople. Almost everyone would agree—at least in the Persian-speaking context around me—that, in everyday language, it reminds them of traditional marriage rituals in our culture. Traditionally, when a young man and his family make their minds in their search for a girl for him to marry, they make a formal proposal to the girl's family. If the girl and her family basically agree with considering the proposal, a vital task, then, is to get to know the boy and his family and gain enough information about different aspects of their life to be able to come up with a yes/no response. The girl's family and possibly a few close relatives and intimate friends would help with this process of searching for various types of evidence from different sources. This entire *knowing* attempt is referred to as *tahghigh*. This process interestingly projects several essential aspects of meaningful research in social sciences and humanities: a boiling concern, a painstaking process of searching for evidence, and a life-changing decision.

It has been more than 20 years now since I first read about qualitative research as an undergraduate student of language education. Later, research methodology courses that I passed as a graduate student were strictly quantitative but my enthusiasm for qualitative inquiry never ceased. The more I learned about the theoretical and practical aspects of quantitative and qualitative research (as an educational requirement and out of personal eagerness, respectively), the more I realized that the main appeal of qualitative inquiry is that it brings academic involvements to the vicinity of real life. Rather than distancing people's thoughts, views, and words from everyday life, qualitative perspectives and practices may help us pursue academic research as part of our lifelong endeavor of seeking further learning and understanding. Qualitative inquiry can be embedded in one's life as an ongoing quest for meaning and for better living. Given the nature of mainstream academic knowledge (Ghahremani-Ghajar & Mirhosseini, 2011a), this might sound too much

of an ideal, but it can be inspiring in terms of providing an image of research as "searching for truth or seeking answers to burning questions and passions" (Fasheh, 2003, para. 5).

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Apart from texts on quantitative and statistical research methodology in applied linguistics and language education (e.g., Loerts, Lowie, & Seton, 2020; Roever & Phakiti, 2017; see Brown [2004] for more titles), in books that carry broad titles of research methods in the field, qualitative approaches have traditionally been overshadowed by quantitative ones (e.g., Dornyei, 2007; Larsen-Freeman & Long, 1991; Mackey & Gass, 2005; Nunan, 1992), although this trend might be changing in more recent publications (e.g., Avineri, 2017; King, Lai, & May, 2017). Qualitative approaches in first language literacy education have their own book-size publications (e.g., Albers, Holbrook, & Flint, 2013; Heath, Street, & Mills, 2008; Kamberelis & Dimitriadis, 2004; Schaafsma, Vinz, Brock, Dickson, & Sousanis, 2011), and even the relatively young mixed methods approach in language education has its own textbooks (Brown, 2014; Riazi, 2017). However, books on the specific topic of qualitative research methodology in the area of language education are not many. There are about a dozen books that connect an aspect of qualitative inquiry to applied linguistics and language education concerns. But they have not so far provided beginner researchers in the field with a comprehensive and practical source that brings the philosophical, methodological, and practical aspects of qualitative language education research together.

Some of these books are edited volumes that do not focus on research methodology but on content concerns (Bailey & Nunan, 1996; Davis, 2011; Gabrys-Barker & Wojtaszek, 2014), are research-level volumes (Barkhuizen, 2013; Mirhosseini, 2017a), or do not basically aim to provide a coherent guidebook (Heigham & Croker, 2009). A few of them focus on specific traditions such as ethnography (Duff, 2013; van Lier, 1988), action research (Burns, 2009; Wallace, 1998), narrative inquiry (Barkhuizen, Benson, & Chik, 2014), or grounded theory (Hadley, 2017). There are also a couple of books that seem to aim at providing a general guidebook on doing qualitative research in language education (Richards, 2004; Zacharias, 2012). They are, therefore, admirable works as pioneering attempts in this regard. Still, they may not be easily judged to have comprehensively brought the depth of the theoretical foundations and the spread of the practical challenges of qualitative language education research together in a beginner-friendly manner. Hence, there may still exist much room for a main text to be used in courses of qualitative language education research methodology that covers different theoretical, methodological, and procedural sides of construing and conducting qualitative studies in the field.

Doing Qualitative Research in Language Education is an attempt to address this perceived need. In addition to bringing the basic philosophical underpinnings of research and the details of practice together, an important feature of the book is that doing qualitative research is considered within the context of specific theoretical and practical concerns of the field and illustrated by examples of language education rather than generic topics of fields like sociology and psychology. 'Language

education' is considered in a broad sense that encompasses various aspects of foreign/second/additional language education (including the teaching and learning of English as an additional language), and the content ranges from very basic conceptions to detailed practicalities. Therefore, the audience of the book can include advanced undergraduates, graduate students, researchers, and instructors of courses of (qualitative) research methods in disciplines including applied linguistics, second/foreign language teaching, TESOL, and literacy education. Besides, just as such courses have been using textbooks from other disciplines, this book may also be useful for researchers in other fields of humanities and social sciences.

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The first chapter of the book deals with fundamental theoretical issues of knowledge types and different ways of knowledge-seeking as the major considerations distinguishing different research approaches. The chapter first discusses positivist views, the type of knowledge these views recognize as viable, and how they envisage the process and outcome of research. Features of constructivist and interpretive positions are then elaborated upon and the kind of knowledge and processes of research based on such positions are discussed. Understandings of qualitative research questions and designing qualitative studies are addressed in the next two chapters. The chapter on research questions carries the philosophical argument of the first chapter to the realm of actual research in the vast area of language education and examines the topics that can be explored through qualitative inquiry and how they should be conceptualized based on a qualitative stance. The chapter on designing illustrates aspects of planning projects of qualitative language education studies. It also addresses the apparent paradox of the need for designs and the necessity of flexibility as an important feature of qualitative inquiry.

Then, three chapters are devoted to collecting various types of contextualized qualitative data. The first type includes data bodies such as audio/video recordings, fieldnotes, and reflective memos, which can be gathered through participation and observation in settings like language classrooms. Data collection through various kinds of interviews is the focus of a separate chapter, which elaborates on the theoretical as well as practical considerations related to interviewing in qualitative language education research. The selection of interview participants and the variants of interview formats are among the main concerns of this chapter. The third data collection chapter of the book is about qualitative data collection through procedures other than observation and interviewing. Several categories of such data are introduced, and the constructed nature of qualitative data as well as the application of multiple data sources in qualitative studies are discussed.

Chapters 7 and 8 turn to the most challenging process of making sense of data in qualitative research. This process of data analysis is the heart of inquiry that paves the ground for the contextualized interpretation and understanding of data, and leads to new learning and knowledge as the aim of research. One of these chapters is about qualitative data analysis through the process of coding, which is perhaps the most widely used procedure in exploring qualitative data. Theoretical

considerations related to grounded theory perspectives as well as the practical processes and procedures of data coding and categorization in qualitative language education research shape the main body of this chapter. The other data analysis chapter covers issues of the qualitative analysis of data through procedures other than coding. Specifically, some theoretical and practical aspects of narrative analysis are discussed, and various other modes of qualitative data analysis as well as the application of computers in making sense of qualitative data are briefly addressed.

The intricate issue of the quality of qualitative inquiry is dealt with in Chap. 9. Revisiting different approaches to understanding and assessing the strength of qualitative studies, the chapter discusses the conceptual and practical considerations that can enhance the quality of research. It also touches upon questions of ethics in qualitative research in the field of language education. Finally, the last chapter of the book turns to writing qualitative research reports. First, the aims and the general climate of qualitative research writing are considered within the methodological spirit of qualitative inquiry. Then, some practical aspects of writing reports of qualitative studies are mentioned before the chapter introduces a number of related journals. A few journals which focus on theoretical and practical aspects of qualitative research are introduced along with some journals of applied linguistics and language education that are open to qualitative studies in the field.

Each chapter begins with a brief introductory section and then the main body elaborates on the specific concern of the chapter in various sections and subsections. I have attempted to balance the focus on conceptualizations and understanding the theoretical dimensions of issues under consideration on the one hand, and the procedural aspects of doing qualitative research in practice, on the other. In addition to some considerations of topics related to language teaching and learning within the text, each chapter contains several off-the-serious-text boxes that provide topics for reflection, tasks, analogies, practical examples, and so on. The boxes play a significant role in situating the discussions within the field of language education and inviting readers to construct their own understanding of research based on contemplations on the theory and practice of the field from the very beginning of their acquaintance with qualitative inquiry.

Moreover, apart from the main body, each and every chapter ends with two sections. In the first one, titled Questions, several problems are raised about some delicate dimensions of the content of the chapter that might boggle those new to qualitative inquiry, despite the elaborations provided in the text. The questions reflect the frequent queries raised in my class sessions of graduate courses of qualitative research methodology in language education at Alzahra University during many terms. They are in fact the contribution of my MA and PhD students participating in these courses in the past several years. In the Further Reading section at the end of each chapter, some quite readable books, book chapters, and journal articles related to the specific topic addressed in the chapter are introduced. The annotation about each source is aimed to provide hints for those who are new to qualitative research but are curious to know more about the introductory discussions presented in each chapter.

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Before closing this opening note, I should address a point of controversy that tends to be raised about advocating qualitative research in quantitative-friendly academic spheres. It may be argued—sometimes even by proponents of qualitative research— that the introduction of qualitative approaches should be focused on explicating these approaches themselves rather than criticizing traditional research trends. I agree that too much emphasis on confronting quantitative research can distract us from gaining a deep understanding of qualitative inquiry. However, it should be noted that given the dominance of experimental research in shaping academic orientations and even public consciousness about science and research, an important aspect of understanding qualitative perspectives and practices is a critical encounter with the naturalized and taken-for-granted positivist tendencies embedded in academic and nonacademic life. That is why—although I do not concentrate on confronting and rejecting quantitative traditions—at various points in the book, I rely on a discussion of certain better-known perspectives and practices in experimental and quantitative research to explain the qualitative ones.

Although qualitative approaches are still marginalized in mainstream social science research in many fields of inquiry, the depth of theoretical debates and the spread of methodological and practical discussions about them in the literature are overwhelming. The body of theoretical texts on qualitative methodologies and the bulk of empirical qualitative studies in the area of language education are rapidly expanding and increasing, like in many other academic areas. Furthermore, discussions have been raised about moving beyond qualitative inquiry, and there has even been talk of post-qualitative research (Lather & St. Pierre, 2013; St. Pierre, 2014). Thus, no book can claim to have comprehensively covered the entire theoretical and practical landscape of qualitative research in any disciplinary area, or even to have exhaustively introduced all the related aspects as a beginners' guide. Nonetheless, I hope that this book provides a worthwhile introductory guidebook on qualitative research in language education, and more importantly, I do hope that it invites young researchers in the field to the realm of qualitative inquiry as close to real-life *tahghigh*.

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Contents

Chapter 1
Ways of Knowing and Knowledging

It is common to open the discussions in research methods books—like many other academic texts—with a *definition*. Definitions sound assuring and helpful as a point of departure in dealing with challenging issues like research. Seasoned readers of books on research methodology may well remember emphasis on systematicity, methodical procedures, answering questions, and adding to the current bodies of knowledge, as prominent elements in definitions of academic research that appear in early paragraphs of such books. However, definitions of all types, including those of research—and more specifically, language education research—are essentially rooted in, and based on foundational philosophical assumptions and understandings. Therefore, prior to providing definitions, or at least along with them, it would be curious to think about such assumptions that seem to be even more fundamental than definitions themselves.

As noted in the Preface, language education scholars have not seen many guidebooks on conducting qualitative research in the specific area of language education. However, the field does shelf a handful of research methods textbooks for applied linguists and language educators, hardly any one of which sets out from philosophical understandings underlying the main ingredients of their definitions of research such as 'systematicity'. Regardless of the question of how these different authors have come to an agreement on bypassing the philosophical foundations of their discussions, conceptions of research *are* based on deep-rooted worldviews and assumptions. The array of experimental research methods, which are widely applied and taught in the field of language education, are all more or less based on one type—out of different possible types—of philosophical understandings of research. This one type, therefore, appears to be taken for granted as the only viable foundation for definitions, theories, and practices of academic research, but it is not.

What are the basic assumptions—centrally including the conception of *knowledge*—that shape the fundamental understandings of research in

mainstream language education studies as reflected in our research methods textbooks that have appeared within the past several decades? What other conceptions of issues like knowledge and knowledge-seeking are possible? What kind of understandings and definitions of research can we come up with if we adopt other views of knowledge in our conceptualization of research? These are the main foci of this first chapter that shape the stepping stones in our journey of learning to perceive and practice qualitative language education research in this book.

Types of Knowledge

One point that may be relatively easy to grasp as part of the essence of research and may appear to be a relatively straightforward point to agree upon by almost all those who are concerned with academic research, is that research is about some kind of *knowledge*. Even a basic commonsense of academic research tells us that it is about gaining information, understanding, awareness, etc. Perhaps a common aspect of all such notions can be captured by some conception of the word knowledge. Therefore, if the broad notion of knowledge is a basic consideration without which research does not exist, it may perhaps be a fundamental concern in understanding the philosophical basis of academic research. We may, therefore, think about what knowledge means, and how it may be sought and gained through deliberate endeavor.

I find it formidable and little-helpful in a book of this nature to pose this question in a bluntly philosophical manner; *what is knowledge?* Nonetheless, slightly closer to real-life, a question that I propose as part of the main argument in this chapter is about the types and features of the knowledge which is sought in academic research. In the difficult language of philosophers, such a question belongs to the realm of *epistemology* (Pascale, 2011). As a major concern, philosophers deal with even more fundamental questions about the very meaning of being and the very existence of phenomena, which they call questions of *ontology* (Lincoln & Guba, 1985; Maykut & Morehouse, 1994; Pascale, 2011). But in direct relation to the notion of research, they ask questions about the nature and features of knowledge. They do not take the meaning of knowledge for granted. Therefore, at a foundational epistemological level, as language education researchers, we do have the right to ask a question: *what kind of knowledge* do we seek in language education research?

But are there different *types* of knowledge? Is it not the case that science is one thing, that is, *science*, and scientific knowledge is what we seek in academic research? The reality is that despite the widespread popular conception, the answer to the former question is clearly *yes*, and to the latter, is *no*. The idea

that there is only one viable type of knowledge as scientific knowledge that can and should be sought through academic research is a myth (Kress, 2011). This myth is forged, on the one hand, by putting emphasis on the view that most of what people know are not science but philosophy, religion, intuition, art, superstition, or some other label. On the other hand, the myth dictates that what is not science and scientific, is not valuable and worth seeking or, at least, is less valuable.

Here is a brief list of different types of knowledge (in a broad sense, comprising know-how, skill, awareness, wisdom, etc.). Do you usually remember these kinds of knowledge when you hear the word 'knowledge'? Do you believe that these types of knowledge are less or more valuable than, or perhaps as valuable as, 'science'? Can you imagine replacing these various knowledge types with a single type as the only valuable one and ignore the rest?

- *Farmers know the harvest time by checking the color and quality of their crops. (Born and raised in a green rural area, I have an idea of this kind of knowledge about some fruits.)*
- *Mothers know what babies need from the way they cry. (I have no such knowledge, for obvious reasons!)*
- *People know how to cook and professional chefs know a lot about food, cooking, and eating.*
- *People know how to drive, how to ride a bike, and how to repair cars and bikes when they break down.*
- *Artists can create works of art and they know a huge lot about aesthetics and arts (painting, photography, carpet weaving, film making, architecture, etc.).*
- *Religious scholars know a lot about faith and the dos and don'ts of life for practicing believers, and ordinary people have various amounts of their own religious knowledge.*

Which one of these knowledge types do you possess? What are the sources of—that is, the ways of gaining—these types of knowledge? Can we gain one of these types of knowledge through the source and procedure that yields another type? What would you say about decreeing that valuable knowledge about all of these aspects of life should be gained only through the way you learn how to cook or the way you learn driving?

Consider returning to this section when you read the discussions in the following sections and see what the position of science, academic knowledge, and academic research can be with regard to the diversity of knowledge and knowledging, that is, various ways of gaining knowledge.

Various types of knowledge do seem to exist indeed. They do count as knowledge, although they obviously come from different sources and can be of different levels of ideological and/or practical value. Moreover, it is hardly convincing to argue that they are of less importance than the so-called scientific knowledge. They are all important types of knowledge (comprising information, understanding, learning, awareness, and wisdom) that have played important roles in human life throughout the history. It is not the aim of this discussion to categorize and evaluate different types of knowledge or to argue about the possible philosophical differences between the notions of knowledge, skill, art, intuition, etc., but the argument here is that there are different types of knowing in the world. Therefore, it can logically be assumed that various research procedures may exist for gaining different types of knowledge that can be important and worthwhile.

Positivism

Mainstream views of science and academic knowledge—which many people in academia and outside, perceive to be quite familiar and even to be the only type of important knowledge—is known as *scientific* knowledge. Referring to the note on epistemology in the previous section, we may wonder what type of knowledge it is and may want to ask questions about the nature and characteristics of such knowledge. Scientific knowledge, as the basis of modern science and its associated procedures and products, including scientific research, is based on a philosophical position known as *positivism*. Despite the apparent diversity in its different variants like classical positivism, logical positivism, neo-positivism, and post-positivism, the essence of a positivist epistemological position can be captured in a few basic features. The following sections provide a quick overview of features of positivist knowledge, research approaches that have been developed as ways of gaining such knowledge, and positivist research in the broad academic area of applied linguistics and language education.

Positivist Knowledge

Positivism is the intellectual child of modern time distancing of seventeenth and eighteenth-century European thinkers from older knowledge traditions. It was theorized that knowledge in modern societies should transcend traditional forms of its

existence such as religion, metaphysics, art, and experience. This modern conception of knowledge—re-conceptualized as science—was based on a few fundamental premises. The reality as the subject of knowledge was defined as a fixed singular entity out there which is perceivable by human senses. Moreover, the complexities of the phenomena that are to be known were perceived to be understandable by reducing and breaking them down into their constitutive elements. Understandings about these elements and pieces could then be put back together to provide images of the whole. To gain accurate knowledge of the true reality of phenomena, the emotions, attitudes, and subjective personal characteristics of *knowers* were deemed to be kept separate from the external objective measures of the *known* (Kincheloe, 2003; Kress, 2011; Spencer, Pryce, & Walsh, 2014).

On the basis of such assumptions, scientific knowledge in the positivist sense has come to be known with a number of features. The knowledge that science is expected to produce about aspects of the world is expected to be exact and to be shaped by the exact measuring of entities that can be captured by senses. Scientific knowledge also needs to be objective in the sense of staying devoid of metaphysics, human subjectivity, and any other non-measurable intrusion. Such factual knowledge is, then, considered, from a positivistic perspective, to be universally generalizable and applicable to similar instances in the rest of the world based on exact mathematical measures and calculations. "With the realization of this type of scientific enterprise…, Western thought was prepared for the advent of what many have called 'the era of positivism'" (Kincheloe, 2003, p. 71).

Based on a positivist mentality, these characteristics are supposed to produce factual, unbiased, and universal knowledge. Naturally, scientific ways of gaining and gathering this kind of understanding—that is, scientific research methods— should be devised in a way that produces such knowledge (Beuving & de Vries, 2015). This is the foundational epistemological stance that underlies experimental and statistical research procedures. Research methods textbooks that start with a quick definition of research and then move to defining research variables and statistical designs, in fact, take this basic epistemological perspective and such positivist features of good knowledge for granted as the obvious and unquestionable basis of worthwhile knowledge and viable academic knowledge-seeking endeavors.

One more point about positivism is that although it is claimed to be practically dead nowadays, and there is hardly any department of philosophy of science today that bluntly supports and promotes positivism, positivist mentalities and attitudes are still embedded in academic and even public cultural spheres. Through the widespread influence of academia, education, and media, positivism has become naturalized as part of the commonsense of many people around the world, who unknowingly tend to see the world from a positivistic lens (Kincheloe & Tobin, 2009). The note below, taken from my own earlier writing, provides a three-sided example: It illustrates the notion of positivist knowledge in simple words; it provides an idea of a positivist way of gaining knowledge, that is, positivist research—discussed in the next section; and it depicts an interesting instance of how positivism has been embedded in the public and academic sphere through early education.

*The third-grade science book used nationwide in the Iranian educational sys-
tem introduces the 'scientific method' by inviting young students to put on the
shoes of 'scientists' in an experiment:*

> Act like scientists
> A scientist thinks about everything carefully. You, too, can think like scientists.
> To think like scientists, observe everything carefully…
> Make hypotheses…
> After making a hypothesis, you should design an experiment to test and see if
> your hypothesis is right or wrong…
> During the experiment, observe everything carefully and make notes of whatever
> happens…
> Think about the causes of whatever you observe and then make a conclusion…
> (Ghahremani-Ghajar & Mirhosseini, 2011, pp. 223–224)

*The key notions of positivist knowledge and knowledging procedures are
introduced in young children's own language. Such traces of positivism in the
early years of general education, along with a stereotypical image of a 'sci-
entist' in a white coat with a test tube in hand, is part of the subtle mechanism
of naturalizing positivism in societies around the world.*

Positivist Research

The myth of the existence of only one type of significant knowledge produces a
further myth: there is only one systematic and methodical way of gaining that one
kind of legitimate knowledge, and this one way is the *scientific method* (Bauer,
1992). The scientific method is a way to guarantee that the knowledge gained
through the research process meets the requirements of positivist science. It relies
on standard quantifications of necessarily measurable aspects of phenomena and
applies mathematical calculations and statistical procedures to find cause-and-effect
interconnections among specific variables—that is, links among specific de-
contextualized aspects of the phenomenon under investigation. Considerably, in
positivist research in areas of social sciences and humanities, even human behavior
and characteristics are reduced to certain de-contextualized variables that purport-
edly surrender themselves to mathematical measurement.

Therefore, methodological frameworks and practical procedures of quantitative
and experimental research approaches are standard ways of preserving positivist
assumptions in the kind of knowledge that is produced through research (Maykut &
Morehouse, 1994). Such knowledge is claimed to be objective and to bear no trace
of human sensations and subjectivities. This kind of objective knowledge is usually
about a specific minor aspect of a complex phenomenon—as complex as the

psychology of human involvements like language learning—and purportedly provides exact knowledge about single bits and pieces of that phenomenon. The accumulative sum of the findings about singular pieces and elements supposedly provide knowledge of the whole phenomenon. Moreover, such knowledge is said to be generalizable to other instances and wider populations. To take care of such standards in the type of knowledge that positivist research produces, there is a plethora of research designs, a huge number of statistical measures and formulae, and many sophisticated techniques of checking reliability. The details of positivist experimental and statistical research approaches are not the concern of this book and are already well established and widely presented in numerous books on research methodology—including books on research methods in applied linguistics and language education. This brief sketch is only aimed to provide a backdrop against which the epistemological arguments in this chapter can be developed.

Quantitative Language Education Research

In providing an assessment of learners' language ability as a kind of knowledge about their language learning, taking the positivist standpoint as the natural given, a language *scientist*, language education *scholar*, or language teaching *researcher* is hardly justified to speak of, for example, good, bad, weak, strong language learners, as this is not scientific talk. *Good* is a layman's loose and subjective understanding of a language learner. A scientific account would need to think about a science-based—say positivist—conception of the issue; '*how good is good?*' A familiar and perfect response comes in the form of a language proficiency test *score*; exactly measured, personal-opinion-proof, and fit to be universally communicated. Positivist quantitative research is expectedly devised in extreme details and with surprising sophistication to gain such kind of understandings and pieces of knowledge about language teaching and learning problems.

In mainstream language education research, manifestations of positivist underlying assumptions are too familiar to require clarification and argument. The well-known learner characteristics that are widely defined as independent variables shape the pillars of many experimental studies based on positivist approaches. Also, the familiar idea of language proficiency test results as popular data sources in quantitative research is clearly based on positivist assumptions and their associated features of exactness, objectivity, replicability, and generalizability. Traditional studies in the entire enterprise of Second Language Acquisition (SLA) as an important sub-area of the broad field of language education, as well as the major bodies of mainstream language testing research, vocabulary studies, and psycholinguistics research, are predominantly experimental and statistical types of inquiry strictly reflecting positivist perspectives.

In addition to the huge volume of published studies within the realm of SLA conceptualizations, there are other indicators of the dominance of positivist research methods in the field. The number of textbooks on quantitative and statistical research

methods is one such instance, indicating that courses of research methodology in graduate programs of language education are predominantly focused on statistical procedures. Next to almost no widely used textbook specifically serving as a guide for qualitative research in the field even today, Brown (2004) reviewed nine textbooks that specifically address practicalities of doing quantitative and statistical research in our field. That was one and a half decades ago and by now more books have been added to this list (e.g., Loerts, Lowie, & Seton, 2020).

Moreover, two studies by Benson, Chik, Gao, Huang, and Wang (2009) and Richards (2009), further discussed in the section on "Qualitative Language Education Research" below, are also other indications of the dominance of quantitative studies in the field, although they do show the relative presence of qualitative inquiry in the field, as well. Qualitative research in applied linguistics and language education is increasingly appearing and gaining relative momentum. This is indicated by the number of books—other than research methods textbooks—that address different aspects of qualitative inquiry in applied linguistics and language education (Mirhosseini, 2017a) as well as by the increasing number of chapters in general books on research methodology in the field (e.g., Paltridge & Phakiti, 2015). Nonetheless, overall, the field seems to be still reproducing positivist statistical research as the dominant approach of inquiry.

Constructivism

Now, what if we start a study one step before the definition of positivist research and before the specification of reductionist variables? What does research look like based on a different epistemological standpoint and a different conception of knowledge? To address such questions, we need to remind ourselves that what we want to know about phenomena in the world—especially those related to human characters, specifically including language education and the diverse problems of the theory and practice of language teaching and learning—can be fundamentally different from what positivism prescribes. Therefore, we need to think about features of possible non-positivist types of knowledge, and then to consider how these other types can give us insights about other ways of knowing, that is, other research approaches.

Constructivist Knowledge

From the perspective of an epistemological position that has been variably called a naturalist, interpretive, phenomenological, or social constructivist one (Beuving & de Vries, 2015), meaningful knowledge is close to real life in the sense that it is multifaceted, nuanced, and fuzzy. Such knowledge may have the elements of several examples of knowledge types provided in the section on "Types of Knowledge" earlier in this chapter. From such an epistemological standpoint, meaningful

understanding, especially when it is about human beings, *cannot be* empty of subjectivities (Flick, 2004). Constructivist knowledge is essentially subjectively constructed and is primarily about a particular instance and situated in a particular context, culture, and setting. Moreover, wisdom and understandings that are gained as part of knowledge about any particular topic can be transferred to wider contexts around the world, but exact replicability and applicability to other contexts regardless of their contextual characteristics and detached from human involvements is not desired, and basically not possible (Merriam & Tisdell, 2016; Taylor, Bogdan, & DeVault, 2016; Tracy, 2020).

Given the naturalization of subtle positivist mentalities for many of us within our everyday life as well as our academic involvements, it might also be helpful to think about social constructivist knowledge in terms of what it is not. Constructivist knowledge is not exact, clear-cut, and absolute but nuanced and fuzzy; it is not fully captured by measures and is not fit to be stated only in mathematical terms; it is not devoid of human subjectivities, perceptions, attitudes, and even emotions, as knowledge is constructed by human beings, their positions, and their entire human characteristics; and it is not completely detachable from its context and presented as universal knowledge, since the role of the social context of knowledge is also vital in how it is constructed, although this very contextualized knowledge can be meaningful in many other contexts as well.

The kind of example and explanation that I provide in this section might itself be criticized for its (post-)positivist flavor as it apparently relies on a reduced and simplified example of a concrete issue to explicate a complex abstract topic. Still, I do proceed with such an example to clarify the idea of different types of knowledge and different ways of gaining it.

The example is about how we can know a simple 'table'. At least two broad categories of knowledge can be assumed when we think about the kind of knowledge that we have or can obtain about a table.

On the one hand, the kind of knowledge that we can have or try to gain about a table can be exact information based on standard measures. One may think of measures of the length, width, and height of the table in centimeters or inches as well as the weight of the table in kilograms. Perhaps more can also be known about the table in terms of its color as well as the physical features of the material used to make the table.

On the other hand, in addition to the measures, what you know about a table may be about what purposes it can be used for, how comfortably it can be used for different purposes, and what kind of people (in terms of age, height, job, etc.) it can serve best. How artistically the table is designed, how beautiful it is, and the aesthetic aspects of how the table is painted can also be part of what we know about it. Moreover, when placed in a room or a hall, the fit and appropriacy of using the table in that setting are also added to other aspects of our knowledge in this regard.

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The first type of knowledge is exact, objective, and universal. The way to gain this type of knowledge is making a few measurements by certain instruments based on universal scales. As far as the instruments are used correctly and measurements are done and recorded accurately, what is known about the table in this sense can be easily checked, agreed upon, and communicated regardless of the person who carries out the measurement and their ideas, thoughts, and feelings.

The second bulk of knowledge about the table heavily relies on what we think about using a table for different purposes, our understanding of how it can be used, our aesthetic perception of the design and application of tables, the setting where it is placed, and even the color that we like for a table. In other words, this way of knowing the table depends on who we are and in what context we consider it. There is no instrument to provide this understanding about the table, and there is no simple way of communicating this kind of knowledge through mathematical signs.

This is a more tangible way of imagining what is meant by different epistemological standpoints, different type of knowledge, and different ways—that is research approaches—of gaining knowledge. However, as the entire argument is shaped around the physical entity of a table, it cannot capture the complexity of knowing or researching and trying to know a complicated aspect of human life like language learning.

When it comes to teaching, learning, and using a language, the first epistemological stance mentioned above about the table and the kind of knowledge associated with it can hardly provide a meaningful image. This is because one can hardly reduce knowing and using a language to a few variables (like length, width, height, weight, color, and substance, in the case of the table). In fact, this is hardly possible even by listing tens of variables.

It is up to the researchers to decide what kind of knowledge they want about language teaching and learning and to select their approach to seeking that kind of knowledge as their research approach, accordingly.

Constructivist Research

Constructivist epistemological positions require their own ways of gaining knowledge. In other words, a certain type of knowledge needs its own specific way of knowing and type of knowledge-seeking procedures. The procedures and processes that we adopt in our attempts at understanding the (human) world and gaining more knowledge—that is, our ways of *doing research*—need to be congruent with our epistemological position (Flick, von Kardorff, & Steinke, 2004). Therefore, a diversity of qualitative research traditions and approaches have been developed as

research attempts based on constructivist epistemological perspectives (Flick, 2014). These traditions have originated in different points in time and in different places with different amounts of commitment to social constructivist positions, and have evolved through decades. They are, therefore, quite diverse and different in conceptualizing and conducting qualitative inquiry. However, with all the diversity among them, qualitative research approaches can be viewed as part of an umbrella conception of inquiry based on an overall coherent underlying epistemological orientation. (See the section on Qualitative Research Traditions in Chap. 3 for a further note on some important qualitative research traditions.)

Qualitative Language Education Research

With a constructivist research position, researchers are able to continually seek and gain profound knowledge about language, language education, and language use without relying on exact measures. In-depth understandings of many aspects of the psychological, emotional, social, cultural, communicative, artistic, etc. aspects of learning, teaching, and using languages can be gained in such *non-scientific* and qualitative ways (Tupas, 2017). Shifting toward qualitative research against the strong tide of positivism in academia and public culture is a challenge. It is still more challenging to pursue this shift in a discipline in which qualitative inquiry was a complete alien up to about two decades ago (Gao, Li, & Lu, 2001; Lazaraton, 2000). An added challenge is for the field to learn how to practically do qualitative research. However, despite these challenges, the potential of qualitative inquiry for enriching research in language education and breathing new life into studies in different subareas of the field is evident.

Two reviews of qualitative research trends in language education published in 2009 provide an idea of the proportion of published qualitative studies in the field (Benson et al., 2009; Richards, 2009). It is illustrated that in about a decade leading to the time of these two studies, qualitative inquiry shaped less than 25% of published studies in major journals of the field. This is an indication of the dominance of positivist research in the field. However, the two studies also illustrate that the field has already recognized approaches like ethnography, narrative studies, phenomenology, and discourse analysis as legitimate research. Moreover, the two surveys show that along with such qualitative research approaches, epistemologically congruent research issues like identity and the social essence of language have also been increasingly considered. Within the past decade since these two studies were published, qualitative research has expectedly gained more ground and the potential of constructivist epistemological perspectives in shaping research methodology as well as research topics in the field has been probably even more evident (Mirhosseini, 2017a). Therefore, it is well justified for the field of applied linguistics and language education—young researchers, in particular—to further embrace social constructivist qualitative ways of doing research.

I have been teaching undergraduate courses of Reading in English as a foreign language for several years. A major concern of mine in these courses has been to practice some kind of extensive reading in a context where intensive reading and drills-based comprehension activities have been traditionally prevalent. An ongoing research idea of mine with regard to these reading courses is the improvements and also the challenges created by such a teaching approach. If this is to be investigated in a research project, what are the two types of knowledge that may be sought about these reading courses based on the two broad epistemological perspectives that I have discussed in this chapter?

One way to explore such a research problem is to set out from a positivist epistemological view. The entire process of teaching extensive reading is defined as the independent variable and the reading ability of the learners as the dependent one. Students in a control group pass a usual course of intensive reading and those in an experimental group experience extensive reading. The two groups take the same reading comprehension pre-test and post-test. The numerical bodies of data collected through the tests are used to investigate the 'effect' of this particular reading involvement on the reading comprehension of the learners.

The difference between the performances of the students reflected in the two sets of tests is expected to create a small body of knowledge in this regard. If probability testing procedures through some statistical test shows significant differences between the results of the two sets of scores, then the researcher can claim to have gained objective and exact knowledge about an aspect of teaching reading. As a natural part of this process, students are viewed as de-personified characters who act as a sample group of foreign language readers—in the absence of ideal random sampling.

On the other hand, understanding this way of teaching reading in this context can be based on the focused exploration of what goes on inside the classroom and what students perceive of the process of reading in this particular way. The process of the course and the experiences of students during the course are recorded and examined in detail with the aim of understanding the challenges and opportunities created by such a course. What we understand about this course through this research process is in-depth and detailed and also influenced by the features of the particular context and the characteristics of the particular group of students, as well as the understandings and attitudes of the researcher.

These two simple scenarios provide quick images of the types of understanding that can be sought about a language education issue, and the research approach that can be adopted to gain that kind of understanding and knowledge. Before embarking on a research endeavor, we need to decide about the nature, depth, and features of the findings that we aim to gain and then to decide about the research methodology that helps us gain that kind of finding. Qualitative research approaches provide procedures for the latter type of studies.

Questions

- ***What is wrong with exact knowledge that is sought based on positivist epistemological views?***

The argument is not about something being essentially *wrong* with scientific knowledge sought based on positivist positions. Such hard-science type of knowledge can be respectable in its own right but, from an epistemological point of view, there are concerns in this regard. This respectability and relevance should be understood within some confinements rather than in an absolute sense. Scientific knowledge can be relevant in dealing with phenomena that can be defined in terms of a certain number of constants, variables, and factors. If the overall state of the phenomenon under investigation can be kept stable and certain variables can be manipulated in controlled situations, then *experiments* and *cause–effect* types of relations may be used as sources of scientific knowledge. Moreover, in this type of studies, the requirements of probability testing should be fulfilled in terms of sampling, control, caution in interpretation, etc. When the research issue is related to humans, the basic problem is that human beings—and even one aspect of human characteristics, like language learning—cannot be meaningfully defined in terms of a few variables. Therefore, a fundamental requirement for experimental studies and gaining objective and exact knowledge is absent in such cases.

Therefore, labeling a language teaching technique as a variable and designing a simple experiment to measure its effect on another variable like vocabulary acquisition of an experimental and a control group is not only reductionist but also naïve. Even in the case of medical research that deals with physical aspects of human beings but does use statistical probability testing procedures, random sampling, large sample groups, and very cautious statistical calculations (e.g., using a p-value of 0.0001) are crucial. Many such studies are conducted over years and in a variety of settings and are then put together in systematic reviews and, even then, the findings are interpreted very cautiously, perhaps at the level of prescribing a new treatment to be tested on lab animals with a prospect of gaining some knowledge to be applied to human beings in a decade or two. The concern with regard to many quantitative studies in social sciences and humanities, then, is oversimplification and simplistic scientism (Mirhosseini, 2017b). The problem about following such research approaches in seeking knowledge about human beings is ignoring these epistemological considerations, bypassing other possible types of knowledge, unduly expanding the scope of scientific procedures, and even elevating them to the status of the *only* viable way of gaining significant knowledge.

- ***Is it not the case that all academic studies are about gaining scientific knowledge? Why should we care about non-scientific knowledge in academic research?***

Academic research is ideally about gaining meaningful and important knowledge. This can be one conception of *scientific* knowledge, in a general sense of the term. However, it is not the case that all research is scientific in the specific positivist

sense of the term and based on an established package of hard-science procedures. There are other types of knowledge that can be sought in ways other than *the* scientific method. Importantly, about human beings, these other types and other ways can be more relevant and can potentially provide more profound understandings.

- *The subjective type of knowledge is biased and personal but in academic research we should look for unbiased knowledge. Why should we seek the subjective kind of understandings and judgments that are resulted from a social constructivist epistemological position?*

There are two assumptions in this frequently asked question that should be carefully revisited. The first assumption is that quantitative research is all unbiased and objective and is bereft of any subjective decisions. However, despite claims of objectivity, exactness, and universality, many aspects of statistical procedures, including the basic theoretical assumptions underlying the notion of probability testing are tentative philosophical assumptions rather than mechanical and exact techniques. The second assumption is that knowledge types gained based on constructivist perspectives and through qualitative research procedures are *biased* in the sense of relying on personal whims and being gained haphazardly. This is simply not the case, as bias in this sense is never recognized as part of qualitative research approaches. As we will see in later chapters, subjectivities, sensitivities, and contextualities that are part of human life are part of qualitative research but not rogue bias.

- *Academic research should be about knowledge that can be generalized to other people and contexts. What is the use of the in-depth understanding of one particular instance while it cannot be generalized to other places and people?*

The concept of generalizability, which tends to be viewed as a necessary feature of research, is in fact a specifically positivist conception rather than a universally relevant characteristic of all types of knowledge and all research approaches. It is based on the idea that if exact scientific knowledge is gained based on measurements and calculations devoid of human subjectivities and contextual particularities, then such knowledge should be universally applicable. From a constructivist epistemological standpoint, however, the contextual situatedness of phenomena—especially human-related issues like language learning—are indispensable aspects of our understandings about them. Therefore, qualitative researchers necessarily situate their studies in relation to specific contexts and particular cases.

This does not, of course, mean that the knowledge that we gain through qualitative inquiry is not relevant to other cases and contexts. Contextualized qualitative studies can be the source of understandings and wisdom that can be transferred to other contexts. In discussing this issue with my graduate students of language education, I refer to the example of my own MA thesis study which explored dialogue journal writing in English as a foreign language by students of a high school in Tehran (Ghahremani-Ghajar & Mirhosseini, 2005; Mirhosseini, 2003). The specific study focused only on high school students, only boys, only English, only Iranians, etc. However, what I learned in that study has been with me and will probably be with me in almost all my teaching of other learners at other levels from primary-school-age children to postgraduates; in teaching other groups of language learners

that can include girls; in thinking about the education of other foreign/second languages; in considering language learners in other countries with other linguistic and cultural backgrounds, etc.

- *How is it possible to make comparisons and contrasts in our research when our knowledge is non-accurate and fuzzy?*

Although a prominent aspect of public conceptions of research and even an important part of academics' views in this regard is contrasting and comparing two or more groups of people, situations, and states of affairs, or a person, group, case, etc. at two or more points in time, overt comparison and contrast are not necessarily important parts of all inquiry. In many cases, focusing on comparisons can distract the process of research by shifting attentions to rudimentary features of issues under examination. What matters most is gaining in-depth understandings about aspects of the research issue situated within the complexities of its context and based on the perspectives, positions, and subjectivities of research participants. Having said that, making comparisons and contrasts in the sense of scrutinizing similarities and differences—rather than mathematical measurements and calculations—can be sensibly carried out with real-life qualitative data.

- *Can we generally say that constructivist knowledge is better knowledge and, therefore, qualitative inquiry is better than quantitative research?*

The argument over better and worse and the challenge of competing camps and even the talk about the *war* between them (Hammersley, 1992) tends to scratch the rudiments of an otherwise deep epistemological and methodological discussion. Regardless of some extreme materialist versions of positivism which are believed to be dead now (Kincheloe & Tobin, 2009), scientific research, experiments, and statistical procedures have played an important role in modern science, even in dealing with human beings, as mentioned in response to the first question above. However, what is problematized in this chapter is putting positivist research on the throne as the king of all knowledge and delegitimizing other types of knowledge and ways of knowing (Tupas, 2017). Therefore, rather than thinking about a simplistic better–worse debate, it would be more fruitful for us to think about the epistemological bases and methodological characteristics of different research approaches and to consider the nature of research issues and problems in language teaching and learning so that we can properly position ourselves in the landscape of research methodology in the field.

- *Is it not possible to apply a combination of quantitative and qualitative research approaches and gain a mix of both positivist and constructivist knowledge?*

Such a combination has been suggested and has attracted a lot of attention under the rubric of *mixed methods* research in social sciences, including the field of language education. At the technical level, the combination of qualitative and quantitative procedures appears an intriguing strategy to enrich research practices. However, from an epistemological point of view which is discussed in this chapter, such a combination may have its own challenges (Mirhosseini, 2018). Therefore, as I suggest later in Chap. 3 (see the section on "Mixed Methods Designs"), beginner

qualitative researchers in the field of language education, either with a background in quantitative approaches or as total beginner researchers, should enrich their understanding of the epistemological and methodological aspects of both quantitative and qualitative approaches before they consider mixed methods. Even if you are to become a mixed methods researcher, understanding qualitative research in its own right would be a prerequisite.

Further Reading

- **Maykut, P., & Morehouse, R. (1994).** *Beginning qualitative research: A philosophic and practical guide*. **London: Falmer Press. (Chapter 1,** *Philosophic underpinnings: An overview* / **Chapter 2,** *Before beginning research: A philosophic perspective*)

The word 'philosophic' appears in the subtitle of the book by Maykut and Morehouse as well as the title of their first two chapters. In their view, dealing with the philosophical underpinnings is essential in understanding even the minor practicalities of qualitative research. In their brief first chapter, the authors focus on explicating the 'vocabulary' employed in discussing such underpinnings. Specifically, they use the terms 'positivism' and 'phenomenology' to refer to the epistemological foundations of quantitative and qualitative research, respectively. In the second chapter, the authors reiterate the importance of understanding the epistemological foundations of qualitative inquiry before embarking on actual research, and elaborate on the notion of paradigm. Based on their paradigmatic distinctions, to specify the standpoints of qualitative and quantitative traditions, they discuss the role of three sets of dichotomies in research practices: 'words and numbers', 'perspectival versus objective views', and 'discovery versus proof'.

- **Kincheloe, J. (2003).** *Teachers as researchers: Qualitative inquiry as a path to empowerment* **(2nd ed.). New York: Routledge Falmer. (Chapter 4,** *Exploring assumptions behind educational research: Defining positivism in a neo-positivist era*)

Kincheloe's book addresses different theoretical aspects of qualitative research within the context of discussions on teacher empowerment. While the first five chapters discuss different philosophical issues with a specific focus on the critical consideration of education and the role of teachers, Chapter 4 specifically examines positivist positions as highly influential but little understood orientations. Kincheloe presents a historical account of the development of positivism and discusses its major premises before elaborating on the major themes of 'neo-positivism', centrally including scientism. The chapter then focuses on a few major concerns including how (educational) research is shaped within the 'culture of positivism'; the need for researchers to avoid simplistic positivist perspectives; and what positivism fails to address. Kincheloe concludes the chapter by arguing that "positivism is more than a way of producing knowledge – it is a force that shapes lives" (p. 88).

- **Kress, T. M. (2011).** *Critical praxis research: Breathing new life into research methods for teachers*. **Dordrecht, Netherlands: Springer. (Chapter 3,** *Positivist research, death of the self***)**

Kress opens the chapter with an anecdote of how she experienced positivism reflected in a doctoral course of research methods. The chapter then presents a theoretical discussion of what positivism is, starting with a brief historical note and specifically highlighting three foundations of positivist views: realism (the existence of a single true reality), reductionism (examining pieces of complex phenomena rather than the whole), and dualism (the separation of people's subjectivities and external objective realities). Then, Kress follows the trace of these epistemological bases into the methodological realm of what he calls "the myth of scientific method" (p. 37). Before focusing on critical research praxis as an alternative research approach, a highlight of the chapter is about the 'ghosts of positivism'. This part contains discussions of specific relevance to language education research: "One of the most obvious positivistic ghosts that haunt education is the measuring of inputs and outputs via standardized testing." (p. 43)

- **Pascale, C. (2011).** *Cartographies of knowledge: Exploring qualitative epistemologies*. **London: Sage.**

Pascale explores the epistemological foundations of qualitative inquiry. She specifically focuses on three major lines of discussion on analytic induction as the underlying logic of qualitative research reflected in grounded theoretical perspectives; symbolic interactionism and its variations that play an important role in different qualitative traditions; and ethnomethodology as an internal challenge to qualitative perspectives. Throughout the book, the author presents her critique of qualitative research and specifically illustrates the realization of qualitative perspectives in the actual process of analyzing empirical data. As a distinctive feature of the book, the author addresses these philosophical debates through reviewing the historical background of the traditions under discussion, specifying the analytical frameworks provided by each tradition, and considering the political context of research and the notions of subjectivity and agency.

- **Hammersley, M. (2013).** *What is qualitative research*? **London: Bloomsbury. (Chapter 2,** *Methodological philosophies***)**

The chapter deals with the theoretical bases of qualitative research in terms of ontology (the nature of reality and society), epistemology (the construction of knowledge), and politics (the purpose and social context of research). Hammersley extensively discusses positivism and its implications for methodological concerns in social science research. The chapter then turns to interpretivism, criticality, and constructivism. In elaborating on interpretivism, highlighting the different nature of physical and social sciences, the author emphasizes the necessity of drawing on internal capacities of human beings in the process of social research. In the case of critical perspectives, the distinctive characteristic is said to be their evaluative orientation. As for constructivist philosophies, Hammersley argues that the major feature

is questioning absolute cognition and, instead, emphasizing the role of active processes of the selection and construction of understandings of reality.

- **Tupas, R. (2017). (II)Legitimate knowledge in English language education research. In S. A. Mirhosseini (Ed.), *Reflections on qualitative research in language and literacy education*, (pp. 17–28). Cham, Switzerland: Springer.**

Tupas begins with a note about a manuscript submitted to a language education journal and its rejection. He takes this as the point of departure in problematizing the perspectives that legitimize certain methodological trends and the type of knowledge that they produce, and actively delegitimize language education research perspectives, practices, and products associated with qualitative inquiry. The chapter questions the mainstream concept of research methods as a means of 'commoditization of knowledge' and the consequential devaluation of understandings created through other conceptualizations of research. Drawing on his English language education research experiences, Tupas further examines the challenges of legitimacy for qualitative language education researchers. Specifically, he calls for a recognition of diverse types of knowledge and ways of research and argues that any kind of research should be "judged within its own standards and belief systems" (p. 18).

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Chapter 2
Conceptualizing Research Questions

The starting point of any research is an issue, concern, or problem that you want to know more about. The entire idea of research takes shape around endeavors aimed at knowing more about this research issue and gaining some kind of information, understanding, or knowledge about it. The significance of such an issue is in the fact that without a research concern or topic, no research project or process ever starts. The source and origin of research topics are different; they may come from your life experiences, problems, and pains; you may pick them up from part of your academic involvements; or the problem may emerge at a juncture of your personal life and scholarly activities. In any case, coming up with a research idea and a topic is not as easy as it may appear first.

Even when the research topic is already there with the researcher or is already selected for investigation, the raw topic cannot start and steer the actual process of a qualitative study. You need to further understand, specify, and clarify the topic in the form of a research question so that you can rely on it as a guide in the process of your qualitative research and can address it and gain some kind of added understanding as a result. This chapter elaborates on the ups and downs of coming up with a language education research topic and how you should construct and conceptualize your research question in a way that it accompanies and helps you as a guide in making decisions at various phases of your inquiry and in dealing with different challenges in the process of a qualitative language education research journey.

Research Ideas

When it comes to research topics, one may think of different sources of research ideas. Issues about which you may want to know more can emerge in a variety of ways to give you a topic to address in a research project. In the broadest sense (re) searching is most meaningful and passionate when its subject or problem is intimately felt as a life issue. (See the note on 'marriage proposals' in the Preface.) As

also stated in the Preface, research can ideally mean "searching for truth or seeking answers to burning questions and passions" (Fasheh, 2003, para. 5), although this is rare in modern academia (Sukarieh, 2019). Within this spirit, perhaps the primary origin of many problems and concerns that can be the starting point of a research process is our lived experiences of various aspects of language education (Rose, 2019). However, in academic life, interests that are shaped in different ways, institutional forces of various types, and financial and practical reasons may all be the origin of inquiry issues addressed in research endeavors (Kinmond, 2012).

Sources of Language Education Research Ideas

The lived experience of learning a foreign, second, or additional language is the common asset of almost all language education researchers that can be a treasure trove of many important research ideas (Manen, 1990, 2018). Exploring one's learning experiences can provide a long list of issues in language education from a learner's perspective: difficulties in learning different aspects of a new language; problems with and expectations about textbooks; language teachers' knowledge, behavior, and teaching practices; different aspects of peer influences; the quality and quantity of homework and their usefulness; the use of extracurricular texts, multimedia, and technology; language use outside the classroom; and tests, exams, success, and failure. Retrospective reflection on these concerns of a once-learner from the perspective of a now-researcher may be a source of many burning questions to explore. Researchers' view of their own language learning *memories* may also raise researchable problems about the wider context of language education not perceived by young learners but traceable in their experiences of language learning.

Moreover, still relying on lived experiences of language education, most of the researchers who study issues in language learning and teaching, probably have some kind of language teaching experience as well. A retrospective or current (or, for those with no teaching experience, a prospective and imaginative) view of language education as a teacher can be a richer source of research topics than a learner's experiences. Form a teacher's view, more profound problems may be addressed in addition to raising issues of learning difficulties, textbooks, peer collaboration, homework, technology, language use, and exams (Rose, 2019). Compared with language learners, a teacher is obviously more conscious of dilemmas, hesitations, confusions, and unknowns in the complex processes of language education. Such research issues can create an entire research enterprise of its own, known as *action research* (Banegas & Consoli, 2020; Burns, 2009; Burns & McPherson, 2017). Moreover, looking at language education from a teacher's perspective adds to the scope of possible research topics, since teachers are naturally also aware of teacher-related problems, administrative concerns, policy issues, materials development, assessment procedures, and the wider social, cultural, economic, and political context of language education.

Language education research topics related to real-life language learning, teaching, and use can also come from the society at large. You may focus on different types of media and the reflection of issues related to language education in them; academic and educational institutions and their language education concerns;

related topics within cultural and educational enterprises like private language education institutes, the publishing industry, and translation and interpretation services; local, national, and international language teaching policies and plans of governments; and the specialized programs of language education as an academic discipline. Research issues emerging from such contexts shape a wide range of topics that can be particularly explored through qualitative research approaches since qualitative traditions are generally more inclined to address research problems in their social context. (See examples of such topics in the next section.)

Moving away from the actual challenges in the practically lived contexts of language teaching, there are a host of other topics developed within the theoretical arena of language education as a scholarly and academic field of inquiry. The theoretical landscape of the academic disciplines of linguistics and education as well as sociology and psychology as parent disciplines to the field of language education contains an extremely extensive array of concerns related to language teaching and learning. Moreover, applied linguistics and language education as an independent academic field has developed its own vast landscape of theoretical discussions, research base, and publications for several decades (de Bot, 2015). The ongoing and expanding trends in this vast theoretical arena—although not necessarily always projecting immediately practical and lifelike concerns—are reflected in numerous journals and books on the broad theme of language education and can be a source of research ideas.

Within this diverse theoretical source of research topics and as a result of involvement in theoretical studies and reading in the field, researchers may develop personal areas of interest focusing on a specific set of related topics. Moreover, topics of interest for research may sometimes diverge from the current theoretical trends in the field and may focus on dated research issues and also possibly innovative and even exotic research topics related to various other academic disciplines. Therefore, special personal interests and interdisciplinary issues may also be sources of research ideas in language education. Furthermore, sometimes, rather than finding and focusing on a research topic, you may need to invite, accept, or compete for an already shaped research topic that some institution or organization intends to explore. Funded research projects shape an especially attractive source of research topics for academic researchers.

'Finding' Topics for Student Research

It is not uncommon for students to helplessly *look for* a topic for a term project or even a thesis study. To launch a research process from the starting point of a topic, an overview of the sources of research topics discussed above tells you that your research can address two broad categories of topics: contextual research issues and textual ones. Contextual research ideas may originate from experiences in the context of your language learning and/or teaching life and also from the social context around you as reflected in media, academia, policies, etc. On the other hand, textual research ideas are those taken from the literature of the field and the trending research themes reflected in recent books and journal articles and research interests developed based on such textual sources (Kinmond, 2012).

Therefore, perhaps the best way to *see* your research topic is to have another look at your own language (education) life as a learner and/or teacher. Ideally, rather than *looking for* a research idea, just look back or into your own language learning and teaching experiences and just feel the already-existing research ideas that have possibly remained invisible to you. In the case of my graduate students of teaching English as a foreign language, I ask them to look at their own *ELT life*, that is, life with English language teaching (ELT) and learning. Through a researcher's eyes, look at your teachers, classmates, classroom life, course books, exams, and experiences of using the foreign language outside the classroom. If you are teaching, also think about your teaching experiences, perspectives of colleagues, the feel of being a teacher, attitudes toward teaching materials, understandings of learner characteristics, assessing students' achievements, and institutional and administrative challenges.

> *The following are two cases of contextual and real-life points of departure in language education research. The first research idea is rooted in the language learning experiences of a former graduate student of mine, which continued to stay with the researcher as a teacher. It later became the research issue investigated in her master's thesis. In the introduction to her thesis she writes:*
>
> > *There had always been a question in my mind about why students are usually so concerned about not making any mistakes in their English language use, to the extent that they sometimes rather remain silent to avoid any mistakes. Because of my different language experiences in some foreign countries, I was personally good at high school English but I never knew what grammar rule I was using. When my classmates asked me how I knew the answer to grammar questions without memorizing the rules, my answer was 'it just feels right'. Later, as a student of English language, I did not fully learn the grammar terminology and all those labels but I continued with that 'feeling right', although I was never sure if that was the ideal. As an English teacher, I have continued to think about this issue for a long time. This has been the starting point of the current research on similar concerns in the context of university courses of General English which welcome students early in their university undergraduate studies.* (Pakizehdel, 2017, p. 1)
>
> *The second case is a study by* Illesca (2007). *In the process of a narrative inquiry, she explored her own experience of teaching English in a secondary school in Australia. The focus of her inquiry was on the conflict between her beliefs as a teacher and her administrative role that potentially included the implementation of certain ideological practices like giving standard tests and categorizing learners based on their achievements. She examined local government policies that shape her ideologically loaded responsibilities and questioned the norms, standards, and conceptions of knowledge that were embedded in and practiced through those policies. The particularly important feature of this research in the context of my discussion of contextual topics in this section of the book, in Illesca's own words, is that the study "emerges out of my own experiences as a teacher. As I write this I can hear the voices of the students who sat in my literacy remediation classes and I am reminded of some of the moments that we shared.".* (p. 148)

Equally important and insightful in your thinking about a research issue is your conscious attention to many aspects of what goes on in the wider context of language education. The *context* of language education is vaster than the so-called language labs, language classrooms, and even the wider settings of educational institutions. Look at the examples in the following box and see how ideas for your language education research may lie in apparently irrelevant spots like writing and publishing research reports and articles in academic journals; ideological perspectives in different countries and the reflections of such ideologies in official documents and media; the policies and decisions of countries in a regional organization; the nationwide consideration of economic and social opportunities and (in)equalities in a society; and a historical view of political, social, and educational policies at a national level.

These are the research issues addressed in some published studies that explore an issue originating from a language education concern in the societies where the studies are conducted. They can exemplify language education research concerns beyond the classroom and may inspire numerous similar research ideas in other contexts around the world.

- Ramanathan's (2006) *research idea was about teaching English in Gujarat, India with a focus on the fact that English language in such a context is influenced by teaching Gujarati. His research addressed the problem of how pedagogic practices of teaching the vernacular can challenge some of the assumptions of Western university programs of language teacher education, and how the West-based programs and vernacular practices can be linked in teacher education in TESOL (Teaching English to Speakers of Other Languages).*
- *The research idea in a study by* Ferguson, Perez-llantada, and Plo (2011) *was shaped around the challenges for non-English-speaking academics created by the dominant trends of writing and publishing in English as the major language of academia. They focused on the context of a university in Spain to examine and discuss some possible policy interventions to address the disadvantages in this regard for non-native writers of academic English.*
- Lin (2014) *explored English language (education) in East Asia from an ideological perspective. Her research idea was investigating the position of the English language and the public ideological assumptions about it in China, Japan, South Korea, and Taiwan, as reflected in official educational documents as well as advertisements and news reports in the media of these countries.*
- Kirkpatrick and Liddicoat (2017) *considered the policies of language education in East and Southeast Asia including the countries of the Association of South East Asian Nations (ASEAN) and specifically examined the lan-*

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guage education policies of five of these countries. Their research idea was about the officialization of English as the language of ASEAN and the implications of the related policies of cultural and linguistic diversity in the region.

- Erling's (2017) *research idea addressed the link between knowing the English language and economic success for those who speak English. The main research issue in her meta-analysis of a number of published studies was the examination of the economic opportunities as well as the possible inequalities created by English language education in the society of Bangladesh.*
- *Based on qualitative content analysis,* Dafouz (2018) *studied the pedagogical features and identity-related aspects of English Medium Instruction (EMI) in a teacher education programs at a Spanish university. This research idea was addressed based on online interviews of EMI university instructors and depicted some benefits as well as challenges in this regard in a European university context.*
- *The research idea in* Nguyen's (2018) *study was shaped based on a historical perspective of language education. The research addressed the political aspects of English language teaching in Vietnam during 1980–1990. The research idea interconnected language, education, politics, and society in its particular context of investigation.*

In addition to the ideal contextual approach to *seeing* research ideas, you may also think of a more textual way of *finding* a research topic. As a graduate student, you may cover a bulk of theoretical discussions on linguistic, educational, sociocultural, psychological, cognitive, etc. aspects of language education that shape your language education life. Away from the practical settings of language teaching and learning, in this textual atmosphere of language education scholarship and research, it requires little argument that almost all theoretical aspects of language learning and teaching processes are still far away from resolved. In your reading of the diverse academic publications in the area of applied linguistics and language education as a scholarly field of inquiry and an academic discipline, you may find many issues in need of further exploration.

Thinking and reading about various theoretical issues related to the broad academic area of language education can create *areas of interest* for researchers. These theoretical interests may not necessarily reflect or even relate to the actual practices of language learning and teaching but do, otherwise, shape a considerable body of research in the field. Therefore, going through the list of article titles published in top-tier journals, the publications of well-known scholars, and the presentations at famous conferences in search of *fashionable* research topics may also be among the options for those who need to hunt for a topic. You can also look at research and

publications of department members at your own institution and the published and supervised works of your supervisor and pick up a research idea.

Even when a considerable body of theoretical knowledge is developed about an issue in language education, scholars are usually not happy with their work being labeled as purely theoretical and detached form practice. Therefore, in the case of such textual topics, bringing textual research back to the context of real-life language education through developing practical frameworks, models, and techniques can add to the diversity of such textual research topics. Moreover, with a qualitative research approach, even vastly investigated topics can be explored from a different vantage point, in a different setting, and with the involvement of different participants and researchers. Overall, exploring textual topics *can* also contribute to contextualized understanding of language education concerns through qualitative inquiry. (Barkhuizen's [2019] book on *Qualitative Research Topics in Language Teacher Education* is perhaps a unique text that can provide many examples of such topics in a specific area of language education.)

In a recent bibliometric analysis, Lei and Liu (2019) *examined articles published in 42 journals of applied linguistics and language education in a period of 12 years leading to the time of the study. They focused on a few aspects of the research trends represented in this period, including 'the most frequent topics'. They state one of the motives for such a study to be enabling researchers "to stay current regarding research trends in the field and to make informed decisions on what research issues to investigate" (p. 1).*

They reported different categories of research topics based on the frequency of the topics in their data. One category of their results comprised research topics that constantly remained the most frequent ones during the 12 years. These topics are reported to be communicative competence, academic discourse, vocabulary acquisition, discourse analysis, heritage language, self-efficacy, and corpus-based studies. You can also refer to their systematically selected journals to see the frequent topics for yourself.

Do you think these topics would be your priorities for your qualitative research? In considering these topics, you may need to think about two issues. First, do such topics represented as hot 'textual' topics necessarily capture the concerns that you, your language education community, your local or national society, and the field of language education need to address as 'burning questions'? In other words, are these textual topics—at least partially—contextually relevant to your language education life?

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Second, like any other type of knowledge, these topics are founded on some epistemological perspectives—regardless of the awareness of those who research these topics about these perspectives. Are the epistemological foundations of these topics congruent with the ones you adopted in your qualitative research approach? The mainstream conception of some of these topics may be rooted in epistemological standpoints that are at odds with a constructivist view. To avoid an internal epistemological paradox in your research, you need to select congruent topics or conceptualize your topic in an epistemologically congruent way. (See the section on "Conceptualizing Qualitative Questions" below for a related discussion. As for alternatives to some of these mainstream most frequent topics, see the section on Qualitative-Friendly Language Education Journals in Chap. 10.)

More realistically, perhaps a combination of textual and contextual approaches may work best in search of research topics, especially for novice researchers. The language education life of researchers in the field is shaped by a mix of contextual experiences of language learning and teaching and the related social concerns, *and* the theoretical discussions in the literature. A helpful piece of practical advice for graduate students is to review their theoretical readings and various course contents, to go through the table of contents of as many publications as they can, view the publications lists of as many researchers as they can (including their supervisor), *and* to reconsider different aspects of their own language education life. Think about texts in terms of contexts and about contexts in terms of texts in order to come up with a meaningful research idea. It might be challenging to (help a beginner researcher) bring together the ideal of addressing burning questions rooted in real-life language education and the multiple practical and institutional requirements surrounding research, but this can be an optimal way of initiating student research. By embracing this challenge, hone your questioning attitude and your ability to *construct* meaningful researchable questions.

From a Topic to a Question

Although deciding about a broad research idea is a step forward in the vast landscape of all possible topics in the field, you still need to specify the research idea at least at two more specific levels. When, based on textual and/or contextual clues, you decide that you want to work on a research issue like young language learners' reading challenges, academic writing in English as a foreign language, language teacher education problems, using mobile technology in language education, assessing language learners' ability to orally express themselves, cultural concerns in teaching and learning a colonial foreign language, second language education policies, etc., you are thinking about your research idea at the level of a *topic*.

Here is a list of some language education research ideas that can originate from textual and/or contextual sources. These research ideas are stated at the level of topics, still far from a research question that can act as an essential guide in conducting a qualitative study.

- *Language teacher education and preparing professional teachers for high schools and private language schools*
- *Peer interactions and the facilitation of classroom language learning through such interactions*
- *The cultural elements embedded in foreign language teaching and learning*
- *High stakes proficiency tests and their connections with language teaching practices*
- *The structure of language teaching textbooks and their function in language teaching for the purpose of real-life communication*
- *Teaching English as a foreign language based on the perspectives of English as an international language (EIL) and English as a* lingua franca *(ELF)*
- *Teaching academic writing in English to non-English-speaking students for the purpose of publication*
- *Awareness of the discursive aspects of language learning in university-level language education*
- *Language learner autonomy in using learning materials other than textbooks*
- *Intercultural aspects of communication in teaching and learning a foreign language*
- *People's attitudes toward foreign languages*
- *Economic and social advantages of learning a second language*
- *Learning a foreign language by already bilingual people as a third language*
- *Native-speakerism and its different implications in language education*
- *Assessing language learners' communicative ability in real-life contexts*

With a topic in hand, you are on the track of your research but it still needs further thought. The next step is to perceive your topic as a research *problem*. With each one of the topics in the box above, your consideration of the contexts in your language education life has provided you with personally important concerns to explore and know about more; your reading and involvement in the theoretical side of the field has raised important-enough issues to address; or you have developed a research idea through putting the contextual and textual sides of your concerns together. However, for a more focused conceptualization of the topic in the form of a problem, you need to think about what it is that you *want to know* in the realm of

your topic. To move from the topic to a research problem, this is a crucial question. The following are research problems that can emerge from some of the topics listed above. As it may be inferred from the research topics, within the scope of a given topic there are potentially many aspects that you may want to know about. In other words, your broad research topic may generate multiple research problems.

Research problems are shaped by focusing on the unknown or less explored aspects of a broad research issue. In the following examples, the stated tentative research problems highlight one or more 'what', 'how', or 'why' aspect of a wider research topic. The basic topic from which these problems originate probably contain more such unknown or problematic aspects that can be considered as further research problems.

- *(Based on the research topic addressing the role of culture in language education:) In the process of learning a foreign language, how do different aspects of learner's identity become involved? Can language learning influence or alter learners' identities?*
- *(Based on the research topic addressing the implementation of EIL and ELF in English language teaching:) How have EIL and ELF perspectives been received in the actual classroom practice of teaching English as a foreign language? What are the possible reasons of such a reception?*
- *(Based on the research topic addressing people's attitudes toward foreign languages:) What are the feelings and attitudes of different groups of people toward the (national/second/foreign) languages that are being used and taught in their society? Why have they developed such attitudes?*

Now, you have a research problem but the actual process of conducting the project needs to be guided by a research *question.* When constructed, qualitative research questions are significant guides in making almost all the important decisions about the steps of inquiry throughout the research project, from beginning to design the study up to the details of writing your research report (Kinmond, 2012). On the other hand, as discussed in the first chapter, the contextualized nature of qualitative inquiry is a defining feature of qualitative studies. Therefore, the research question should be contextually constructed in order to be able to guide your study. To move from your research problem to a research question, you need to further specify the problem in terms of the elements like who, what, when, and where. In other words, a qualitative research question needs to be anchored in some time and place in order to be linked to certain contexts and people—as people, not mere research subjects. It must be clear now that a research problem can be developed into multiple research questions and sub-questions.

Conceptualizing Qualitative Questions

In constructing qualitative research questions, you need to distinguish between the significant process of *conceptualizing* the question and the ancillary practice of *stating* it. This is important because many mainstream concepts and notions in language education that can be part of your research questions are arguably rooted in traditional positivist conceptions of structuralist linguistics and cognitive psychology (many examples of such notions are, for example, found in mainstream Second Language Acquisition [SLA] research). With this in mind, in conceptualizing qualitative research questions, a very important challenge is *not* to be carried away by positivist conceptions of prepackaged familiar notions in the theory and literature of the field of language education. Qualitative research questions are expected to be based on epistemological standpoints other than positivism. They should be conceptualized qualitatively based on constructivist positions.

In conceptualizing qualitative research questions, one may need to revisit and re-conceptualize many familiar language teaching notions; even the most taken-for-granted ones like language skills and components, language teaching methods, test scores, and motivation. This is an epistemological argument of its own that goes beyond the scope of the present discussion but for a truly qualitative enquiry rooted in constructivist and interpretive understandings discussed in Chap. 1, qualitative researchers need to adhere to such an epistemological position in all aspects of the inquiry rather than just the research methodology aspect.

A considerable part of the conceptualization of the key notions in our research questions comes from the literature of the field. "Theory is inextricably linked to research questions, whether the theory is shaping them initially or suggesting new questions as the study unfolds" (Agee, 2009, p. 437). If your topic is taken from what I called textual sources earlier in this chapter and then specified, you obviously rely on the already-developed concepts in the field. Even if the topic is a contextual one, you need to read about it, and again the literature influences how you understand it. From the very earliest point where the idea of a research project flashes in your mind, everything stands on some kind of background knowledge of what you know and what you do not know about the research issue based on your theoretical studies. The very decision to further explore a topic and its importance and relevance is based on your background knowledge. Therefore, your reading of the literature should be critical, and especially sensitive and conscious about the epistemological foundations of the concepts that you encounter in texts. Your literature-based conceptualizations of the theoretical notions of the research question are later presented as your literature review, because the parts of the literature that help you understand the study, will probably also be helpful to the audience in reading and understanding your research (Harris, 2020). More broadly, a thoughtful literature review process can importantly support all aspects of any research. As the technicalities of reviewing the literature goes beyond the scope of this book, you can consult sources specifically focusing on literature review, like Avineri's (2017) chapter on "The Noun and the Verb of the Literature Review".

Based on Lei and Liu's (2019) *bibliometric analysis, vocabulary acquisition is among the most frequent research topics in the field. Our practical experience of language learning and teaching might also tell us that learning words is one of the most important concerns in this regard, if not the most important one. However, in conceptualizing qualitative research questions that focus on this aspect of language learning, one should be aware of the concern that fragmenting the so-called skills and components of language (including vocabulary) and the out-of-context teaching, learning, and researching of these fragments tends to align with a positivist view* (Mirhosseini & Samar, 2015).

Such conceptions of language and language education are argued to be based on scientism and a scientific view of knowledge that is rooted in positivism (Mirhosseini, 2017). *Such a view may appear to be at odds with the epistemological underpinnings of qualitative inquiry. Dissecting a complex phenomenon like language into pieces, scrutinizing the pieces out of context, and assuming that the sum of the pieces equals the whole are assumptions that shape a positivist scientistic view. Therefore, conceptualizing a qualitative research question based on the taken-for-granted mainstream conception of vocabulary may be a paradoxical endeavor. Can you think of other notions in mainstream language education theory and literature which reflect positivism and need to be re-conceptualized in qualitative language education research?*

Moreover, an especially important consideration in conceptualizing qualitative research questions is to avoid perceiving the question and what you specifically want to know based on the too-familiar *cause and effect* links and comparative mentalities of experimental research. It may be interesting to notice that quantitative studies that reduce the complexities of research participants to a few variables, claim to aim at finding cause–effect connections among different variables. Therefore, a frequent question in this type of studies is about the *effect* of some variable on another. Comparisons, contrasts, and direct or reverse relationships among sets of data are also central to experimental studies. However, such simplistic relations are not the concern of qualitative researchers. You do need to be consciously avoiding a conceptualization of your research concern in this reductionist sense. Remind yourself that you are going to gain a contextualized and complex type of knowledge and understanding rather than neat results expressed in the form of numerical figures.

Almost all my graduate students in their first attempt at constructing a qualitative question, start with something like 'what is the effect of…'. Nonetheless, we need to bear in mind that in qualitative inquiry—based on its epistemological foundations—research questions tend to address 'processes', 'whys', 'hows', or at least 'whats', rather than positivist cause–effects or linear relationships. Students who start tackling such issues, when justifying the use of words like 'effect' in their proposed research question, say that they do not mean a simplistic positivist effect but a more complex and contextualized one.

Considering the issue of conceptualizing research questions discussed in this section along with the concern over stating them, addressed in the next section, my comment to these students is: if you mean it, you need to revisit and reconstruct your conceptualization of your qualitative research question; if you don't really mean what the word effect typically means in academic research, and you mean something else, so, say something else! State your qualitative research question in a qualitative manner. Other words which can raise a similar challenge include 'impact', 'relationship', and 'factor'.

Stating Qualitative Questions

The challenge in stating qualitative research questions is putting complex, multifaceted, and nuanced conceptualizations into words. Qualitative research questions can hardly be put into a simple interrogative sentence or even in a few specific sentences under the title of 'Research Question'. In many cases, the complex conceptualization of such questions can be stated only in an extended narrative manner, and some aspects of the complexities of special concepts in such questions may be stated in discussing the background of the study; in depicting the setting and participants; or—in the case of theses—in definition of key terms. The section for the definition of key terms in quantitative research reports presents operational definitions—another term rooted in positivist traditions—but can be used in qualitative research to help with clarifying the statement of the research question through explicating particularly loaded terms.

Qualitative research questions are constructed by situating research problems in particular contexts specified in terms of people, places, activities, relationships, time, etc. In terms of conceptualization, then, all these elements are part of our understanding of our qualitative research question. Therefore, when it comes to stating the questions, all parts of a research report that say something about one of these contextual dynamics of the study are contributing to the statement of the research question.

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To see for yourself how the complex and multifaceted aspects of qualitative language education research questions can be stated, one fruitful activity would be referring to published qualitative research reports. In completed theses and published journal articles (See the section on Qualitative-Friendly Language Education Journals in Chap. 10.*), you will notice that different sections variously presented under headings such as setting, participants, and background are in fact carrying part of the load of stating the research question. Even if there is a specifically stated 'Research Question', still, important parts of the notion of question as discussed in this chapter are stated in other sections of a report that describe various aspects of the context of a study.*

An added challenge in stating qualitative questions is that you need to rely on the theoretical language of the field of language education in expressing your questions—and, more generally, in your qualitative research writing—but the bulk of terms and concepts available in the literature of the field of language education tend to be traditionally dominated by positivist epistemological views. Therefore, in stating your qualitative question, see if the main terms in your question are known concepts in the literature of the filed. If yes, then see if what you mean by that particular notion is the same known conception. If what you mean is different, you need to clarify it in a way. Sometimes you may even need to 'resist the known' in your qualitative research (Rivers, 2015).

Do not use technical buzzwords—like *vocabulary* discussed in the previous section—as obvious and taken-for-granted notions, or you may be captivated by what they mean in the mainstream literature. The epistemological basis of what such terms mean might be incongruent with the epistemological basis of your research approach. Moreover, when you conceptualize a word in your own way, do not think that because you are understanding it in a different sense, it can be used the way it is. It may have its own established meaning and, without your explanation, your audience most probably interpret it in its established sense. Either state loaded concepts in different terms or, if you use the term, give yourself some space to explain what you mean by that particular term within the context of your question and your research.

Flexibility and Balance

A final issue in this chapter is about the interconnected considerations of *flexibility* and *balance* in conceptualizing qualitative research questions. You may frequently see qualitative questions in graduate theses stated as *tentative* guiding questions rather than fixed ones. What this does *not* mean is that qualitative research questions can change freely for no good reason. Research questions—like many other aspects

of qualitative inquiry, as we will see in the later chapters—are flexible, but changes in any aspect of qualitative studies are to be well-justified modifications that can happen in response to emerging understandings rather than haphazard and abrupt changes of focus and direction.

Research questions include a problem aspect shaped by what you want to know; a conceptual aspect of the theoretical notions of language education that are addressed; a contextual aspect that specifies the particular participants and contexts of concern; and a methodological aspect related to the research approach. The essence of flexibility is about the fact that your understandings of each one of these different aspects that shape the process of your study, might slightly change—that is, improve and deepen—during the research process. These changes can happen as a result of gaining more profound theoretical understanding through ongoing reading and thinking and/or through more intimate involvement in the research context. When such changes happen, you do not have to stick to the early conception of your research question. Naturally, you rely on your emerging understandings in different stages of the study in pursuit of better research. Therefore, rather than a quality embedded in the question, flexibility is an attitude and mentality held by researchers about their research questions throughout the research process.

Qualitative research questions, therefore, need to be sufficiently robust in conception and clear enough in statement to guide the process of research in designing, implementing, and even later writing about the project. At the same time, though, the very deep understanding of the researcher about the construct of the research question should allow for enough flexibility to allow for appreciating emerging ideas and understandings (Hamilton, 2005). Therefore, an important and tricky responsibility in the construction of qualitative research is to strike a balance between the two extremes of too broad, tentative, and loose questions on the one hand, and too specific, fixed, and tight ones, on the other. Too loose a question (which is close to a research problem discussed earlier in this chapter) is not able to support your decisions during the challenging process of dealing with data. On the other hand, too tight a question (which goes too far in specifying the detailed aspects of context, data, or purposes) may impose a tunnel view that can basically work against the quality of qualitative inquiry (Kinmond, 2012; Maxwell, 2013).

A very important closing note here is that the notions of flexibility and balance are not about conceptualizing and stating qualitative research questions only, but play crucial roles at other points during the qualitative research process. Flexibility, as the quality of being sensitive to probable changes in understandings and research conditions, is a defining feature of qualitative inquiry at almost all stages. Throughout a qualitative study, there should be the possibility of accommodating emerging requirements and making meaningful modifications to conceptions, plans, and procedures. Moreover, at different points in the qualitative research process—specifically including the designing of qualitative projects and data collection procedures (through participation and observation, in particular) —deciding about a balanced position between extreme positions are almost always among the important responsibilities of qualitative researchers.

Questions

- **What is the problem with focusing on 'effects' in qualitative research questions?**

The word effect is frequently used in questions of quantitative research based on the assumption that experimental studies can detect *cause and effect* connections between variables based on principles of probability testing. Different statistical procedures are applied to test different types of such links among variables. In qualitative research, there is almost no place for such conceptions of variables, cause–effect, and probability testing. Therefore, the use of words like effect and impact in qualitative research questions may be a sign of epistemological confusion if they are used in the positivist sense of the term. Even if they are used in a general sense, they may be reminiscent of cause–effect links and may illustrate an oxymoron in the composition of a qualitative research question. The most important concern in this regard, however, is to beware of conceptualizing qualitative research questions based on subtle underlying positivist mentalities.

- **How does the research question guide and direct the qualitative research process?**

The extended response to this question is embedded within the discussions in the next chapters. Every step of the process of research that we will go through illustrates how the research question is a crucial point of reference. However, in a nutshell, the guiding power of a good research question is realized in two broad ways. On the one hand, the rough process of data collection, how you plan for it, the types of data, procedures of data collection, the quality and quantity of data, and almost all the detailed decisions you make about data collection should be done in light of the research question. On the other hand, the ups and downs of the challenging journey of qualitative data analysis need a relatively firm guide that should be sought in the research question. The analytical plan, practicalities, and decisions are all importantly influenced by the research question.

- **What is the problem with too general/broad/loose and too specific/narrow/tight qualitative research questions?**

Qualitative research questions are to function as a general theoretical and practical guide in the process of research, especially when you work with data. At the same time, the research question should be flexible so that it can provide you with enough space to maneuver in understanding, conceptualizing, and theorizing different aspects of research as well as practically doing different steps of data collection, analysis, and interpretation. Too broad questions may fail to function as research guides, especially in the process of data collection and analysis. Too tight research questions, on the other hand, can give you a tunnel view that denies you open-minded theoretical heuristics, practical flexibility, and sensitivity to contextual dynamics and emerging situations in the process of inquiry.

- **What is the difference between the specification of a topic in the form of a research question and the notion of narrowing down the research topic in experimental studies?**

What is known as narrowing down in quantitative studies is based on determining certain variables, defining them operationally, and formulating questions that focus on certain types of links and connections among the variables to be tested through statistical procedures. The important feature of such a process is reducing complicated language learning and teaching processes, complex people and their lives, and complex educational contexts to de-contextualized and dissected elements. In specifying qualitative research questions, however, such reduction is to be avoided. Rather than cutting contextual nuances away in a process of narrowing down, qualitative research questions are specified through limiting the contextual scope and/or the number of people involved, and focusing the attention on a certain contextual spot rather than a vast area. Contextualities and complexities are to be preserved in specifying qualitative research questions.

- **What is the role of hypotheses in qualitative studies?**

It might be argued that such a question—which is frequently asked—basically reflects mentalities anchored in quantitative research. If researchers start with a constructivist epistemological perspective and move from a topic toward a research question, the rise of a question about the need for hypotheses is unlikely. In quantitative studies, an embedded notion within the structure of any statistical test—although not much observable in the actual process of calculations—is a kind of hypothesis about the interconnections among variables. Therefore, how a hypothesis is developed has implications for data analysis and research findings. In qualitative inquiry, fundamentally, there is no need to think about such a notion of hypothesis. Obviously, a qualitative researcher may begin with some specific or general assumptions about the issue under investigation and the possible outcome. These assumptions may be stated in some way or left unstated, but thinking about and stating a hypothesis should be no concern in the process of qualitative research.

- **What does epistemological (in)congruence mean in considering the theoretical concepts of a research question and the qualitative methodological aspects of a study?**

Apart from conceptualizing the research questions in terms of research methodology, any question naturally contains concepts, notions, terms, etc. related to the theoretical and practical aspects of language education. One pitfall in conceptualizing research questions is for these two dimensions of the question to belong to opposing epistemological views. When we attempt to conceptualize the research question qualitatively, it needs to be understood that theoretical conceptions and practical notions in language teaching and learning, too, are founded on epistemological standpoints. The important concern is that perhaps most of the ordinary theoretical concepts in mainstream language education—even the most common ones such as skills, components, styles, strategies, testing, and language

acquisition—tend to be based on epistemological perspectives close to positivism rather than constructivism. Therefore, in conceptualizing research questions, in addition to the methodological side of the question, we need to be careful about the conceptualization of the technical language education conceptions that we consider.

- *How many research questions do we need to (and can we) pose in a qualitative study?*

A simple answer to this question is that there is no simple response. A qualitative study may be about a single question, a couple of questions, several ones, or probably about an overarching question and its sub-questions (Agee, 2009). The scope and multiplicity of the issues being addressed is an important consideration in how to structure the questions and how many of them to state. It is also partly a matter of emphasis and highlighting aspects of a research issue to have a single question or to state separate ones. Most of the time, this can be more a matter of stating than conceptualizing research questions. In any case, avoiding too loose and too fixed research questions and—if multiple questions are stated—the interrelations of different (sub-)questions are to be taken care of.

Further Reading

- **Mason, J. (2002).** *Qualitative researching* **(2nd ed.) London: Sage. (Chapter 1,** *Finding a focus and knowing where you stand***)**

In her first chapter, Mason emphasizes the importance and necessity of clearly developed research questions and covers the process and challenges of shaping general research interests into qualitative questions that can set the basis of designing research projects. To do so, the chapter dwells on important issues—from ontological perspectives down to specific purposes of inquiry—to be considered by qualitative researchers in the process of shaping their research questions. The author's stated aim in her discussions is to help researchers revisit and possibly reformulate their own assumptions in the process of constructing qualitative questions. Specifically, the chapter discusses 'intellectual puzzles' shaped based on ontological and epistemological positions that can be meaningfully addressed through the research process. Such a process of thinking about the research question is importantly expected to help researchers understand where they stand early in their inquiry process.

- **Flick, U. (2007).** *Designing qualitative research***. London: Sage. (Chapter 2,** *From an idea to a research question***)**

This chapter takes the qualitative researcher from a broad area of study to a relatively specific research question. It starts with a brief historical sketch and examples of the notion of research interest and research idea. The examples, taken from Flick's own research, illustrate the role of different types of scholarly interests as the background of research questions before the chapter focuses on the process of

developing qualitative questions. The author argues that broad issues that we want to study are not 'focused enough' to guide the actual research process. He proposes three ways that can lead to specific research questions: formulating a specific question beforehand and seeking answers empirically; starting with a broad idea and specifying the question through the attempt to empirically address it; and starting 'general research question' to be "refined and reformulated, sometimes refocused in the course of the project" (p. 22).

- **Agee, J. (2009). Developing qualitative research questions: A reflective process.** *International Journal of Qualitative Studies in Education, 22*(4), **431–447.**

"Good research questions do not necessarily produce good research, but poorly conceived or constructed questions will likely create problems that affect all subsequent stages of a study." (p. 431) With this as a point of departure, Agee sets out to discuss the process of constructing preliminary qualitative research questions as well as the ongoing process of refining them. Emphasizing that good qualitative questions specify what researchers want to know and that emerging developments and modifications of questions are part of their construction, as the major part of the article, the author discusses the details of the process of developing overarching questions and sub-questions in qualitative studies. The dialogic interaction of researchers' understanding of theory and contexts in this process and also issues of reflexivity and ethics are among the author's other considerations.

- **Kinmond, K. (2012). Coming up with a research question. In S. Riley, C. Sullivan, & S. Gibson (Eds.),** *Doing your qualitative psychology project* **(pp. 23–36). London: Sage.**

Kinmond's chapter sets out from a consideration of the contextualized nature and depth of qualitative research questions that address real-life experiences. This very rootedness of such questions in people's lives is the reason why "you need to get those questions right" (p. 23). Then, the chapter discusses the process of moving from a research area toward the formulation of research questions. Various examples and activities are presented to explicate and illustrate the process of deciding about research issues to explore. The author highlights the cyclic nature of qualitative research questions, the importance of reading around the research issue, and knowledge building about the topic in the process of conceptualizing the questions; the consideration of a prospect of dealing with data in fine-tuning the research questions; and the issue of broadness and narrowness of qualitative questions.

- **Maxwell, J. A. (2013).** *Qualitative research design: An interactive approach*. **London: Sage. (Chapter 4,** *Research questions: What do you want to understand?*)

The general focus of Maxwell's entire book is on research *design*, as reflected in the title. Accordingly, early in the chapter on research questions, he strongly links questions to designs: "Your research questions – what you specifically want to understand by doing your study – are at the heart of your research design." (p. 73) He

argues that qualitative research questions cannot be developed without an understanding of other theoretical and methodological components of a project and that is why researchers do not usually finalize the statement of their question well into the actual process of their studies. The chapter also elaborates on the functions of qualitative questions as well as the role of hypotheses in qualitative studies, and extensively discusses different types and categories of questions that can be constructed to guide qualitative research projects.

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Chapter 3
Designing Qualitative Studies

Having conceptualized the research question, you tentatively know what you want to know. The question gives you the conceptual base and the direction for your qualitative research involvements. So far, your research has been a mental challenge of reading, thinking, and imagining. To embark on the actual process of *doing* your research, you need to prepare yourself for gathering evidence (data) based on which you can address the research question. Later, to make sense of your collected bodies of data you need to explore and analyze them. To successfully handle these processes of dealing with data—which are multifaceted and quite challenging processes—you need to have some prior planning. The planning, which is a complex theoretical undertaking, is compounded by numerous practical considerations. Moreover, in addition to a priori planning for your project, you need to constantly assess the early plan and modify it to meet the emerging conditions of the inquiry process. This vibrant and challenging process of planning for your qualitative research is called *designing*. This chapter is about designing qualitative language education research as the link between the theoretical and imaginative side of the research endeavor with the practical side.

The Notion of Design

When you have a firm (though sufficiently open) idea of what you want to know in your research, that is, when you have a qualitative research question, what you need to do is to design a project. "Generally speaking, the keywords "research design" address the questions of how to plan a study." (Flick, 2009, p. 128) The idea of design is about making a set of preliminary decisions about what you should probably do at different stages of the process of inquiry. It may be helpful at the beginning of this section to refer to the normalized and taken-for-granted conception of design for the general public. Based on the discussions in Chap. 1 (see the section on "Positivist Knowledge") about the publicized images on knowledge and research,

one way to clarify some aspects of the conception of designing qualitative research may be scrutinizing the contrast between the mainstream publicly cherished idea of research design and the concept of designing in qualitative studies.

Public conceptions of 'research'—possibly created and fostered through schooling and mass media—predominantly include white coat scientists handling test tubes. In addition to this laboratory-dominated image of research, public views of research tend to be shaped by the idea of contrasting states of affairs before and after some intervention or comparing different groups of people, settings, conditions, etc.

Such a conception of research can be extended by student researchers into academic research of social sciences, including language education research. Moreover, they might be fostered by the overemphasis of mainstream courses of research methods in the field on cause–effect connections, correlations, and variances.

On this basis, a typical idea for a study on language teaching— possibly in teaching a certain skill or component of a language, to use the words of mainstream research in the field—is to first test the general language proficiency of a group of learners or test the specific skill of concern, and then teach them in a certain way for a period of time and test that specific ability after this so-called treatment again. The difference in the test results is to provide some kind of research finding.

In a more sophisticated manner, a similar group of learners can also take part in the 'pre-rest' and 'post-test' without going through the learning experience of the first group. Various types of comparisons can be made between the four sets of test results in the process of this research.

Regardless of the specific topic and contents of such a research process that can endlessly vary, the specific 'plans' for selecting and grouping the participants, the timing of different activities, and the types of statistical comparisons and contrasts overall shape the 'design' of such (quasi)experimental studies.

This is a typical simple research design that might come to a beginner researcher's mind based on a general perception of research shaped by subtle underlying—and probably subconscious—conceptions of the notion. It includes a plan for the structure and organization of what happens during the process of conducting a research project. This structure potentially determines the steps of collecting data, what happens to the research participants in different phases, and what later happens to the collected data in terms of analysis and interpretation. Various practical

procedures of doing the project as well as the criteria of rigor and quality can also be inferred from such a design. Taken-for-granted expectations about objectivity, exactness, and generalizability can also be easily conceived as embedded in developing such a research plan.

This is a reflection of the predominant public image of research rooted in hard science research traditions that were later copied into social sciences. In a more sophisticated manner, mainstream experimental research designs are viewed as blueprints for collecting and analyzing data. Embedded in experimentalist research designs are also standards of objective and unbiased measures as well as standard procedures of analyzing the collections of measures through mathematical formulae. On this basis, the ideal scientific research design called the true experimental design is known to be based on the essential foundations of random sampling, control, and pre/post-testing. The implementation of such a design—along with catering for standards of objectivity and the application of mathematics-based statistical measures—is claimed to produce unbiased, exact, and generalizable pieces of knowledge. Such views have been well introduced into applied linguistics and language education (Brown, 2004).

In qualitative research, although the word *design* is used to refer to the act of planning a study, it should be basically re-conceptualized—like many other terms that are used in both qualitative and quantitative approaches, but *mean* different things; sometimes fundamentally different things. The qualitative conception of the term mostly refers to a *designing* process rather than a *design* structure. It defies a one-time fixing of a set of steps before the start of the study and following them in a rigidly structured project. In Mason's (2002) words,

> This is because qualitative research is characteristically exploratory, fluid and flexible, data-driven and context-sensitive. Given that, it would be both inimical and impossible to write an entire advance blueprint… In qualitative research, decisions about design and strategy are ongoing and are grounded in the practice, process and context of the research itself. However, although qualitative researchers should not aim to produce entire advance blueprints, in my view, they very definitely should nevertheless produce a research design at the start of the process. The main proviso is that thinking about strategy and design should not stop there. (p. 24)

Moreover, qualitative designing processes essentially accommodate the features of constructivist knowledge and understandings of the quality of qualitative research (see Chap. 9). Like almost all other aspects of naturalist qualitative inquiry, this view of design is close to the everyday-life meaning of designing and planning any endeavor. You contemplate and plan beforehand for almost anything you want to do. The more serious and sensitive the task, the more careful and detailed the plan. However, even the most careful plans can be revisited and modified depending on the possible unpredicted or unpredictable incidents that are always part of life.

To illustrate some aspects of the idea of flexible designing, my typical analogy in graduate courses of qualitative research methodology in language education is 'planning a trip'. The apparently paradoxical idea of designing and at the same time being prepared for altering the design can be captured by thinking about this analogy.

You decide to go on a trip with family, a bunch of friends, or alone. You know how many days you are off, where the destination is, and who is going with you. You decide about how much money to spend, the type of transport to use, where to stay, and what/where to eat. You also think about places to go, things to do, people to meet, etc. If you are a reflective planner, other preparations may also be included, like checking the weather forecast and considering some provisions, precautions, or alternatives, accordingly.

Regardless of your wit and skills in planning, there should always be room for unpredicted (or, at least, for unpredictable) incidents. The weather might not follow the forecast; cars might suddenly need repairs; things might get lost; people can get sick; and many other unpredictable things can happen unpredictably!

It is next to impossible to 'implement' the details of a trip exactly according to a fixed blueprint. In your planning, you do need to be sufficiently flexible and prepared (at least mentally) for modifications. The plan should be balanced; too loose a plan would require you to be ready for a total adventure, and too strictly planned details would probably disappoint you in facing the emerging situations. (See the section on Flexibility and Balance in Chap. 2.)

Designing Qualitatively

With this conception of designing as meaningful and balanced planning for research and as a vibrant ongoing process of *constructing* rather than selecting and following a plan for a research project, in this section I review elements and aspects that should be considered in designing a qualitative study. As you have probably noticed in the example of planning a trip above, qualitative designing is a nonlinear and rather complicated process of considering several aspects of the research process and their prospective mixes, interactions, and clashes. Therefore, although models have been proposed for designing qualitative studies (e.g., Maxwell, 2013), the actual putting-together of the various constituents of the research design need to be done by the researcher within the specific space of the project. What can be provided as some guide and help to beginner researchers is perhaps bringing to their

attention some "influences and components" (Flick, 2007, p. 38) that should be considered in qualitative research designing.

The components and concerns about a project that you need to consider in designing your qualitative language education research can be placed in three main categories plus two sets of additional considerations: the first main category includes issues of purpose, theoretical bases, and the research question; the second one is about a diversity of conceptual, contextual, and practical aspects of data collection; and the third category comprises a host of concerns about data analysis. Issues of the quality of research (as discussed in Chap. 9) and minor practicalities are the other two categories of concerns that should be viewed as integrated with the first triple sets of considerations. Designing a qualitative research project means thinking about how you should take care of all these aspects of research (Flick, 2004; Knapp, 2017; Maxwell, 2013). This thinking happens both in a concentrated manner when you start a study and also as an ongoing deliberation throughout the project.

Purpose, Theory, and Question

As an early indication of the nonlinearity of thinking about the research design, you need to tackle the fact that although the research question is expected to *come before* designing the study, you actually need to think about aspects of your design—sometimes down to the details of mundane practicalities—when you are conceptualizing your research question. I have repeatedly had to ask my graduate students to modify their research questions because the questions were *too good* to be addressed within the practical limits of a thesis. Therefore, both in your thinking about the design before you start the study *and* in your possible designing modifications at any point of the research process, one important concern should be your research purposes and questions. This also includes your theoretical conceptualization of the research topic and the language education issues that your research questions address. In other words, read about your research topics and shape your question while you keep an eye on (if and) how you can gather and analyze appropriate data to address such a research issue.

Data Collection

Perhaps the most complicated set of components and considerations in designing a qualitative research project are related to the process of data collection. Very importantly, you need to decide about your data collection procedures as part of your preliminary designing. Based on the research question and what you want to know,

one or more types of data and ways of data collection should be adopted. (See the next three chapters for extended discussions of procedures of qualitative data collection.) For whatever procedures you select, you need to think about where, when, and how data collection takes place. The scope, quantity, and numbers, as well as equipment and logistics should also be determined. Specifically, as part of your designing, you should see if the data collection process needs involving groups of people, interview participants, and certain informants, and then think about how many of them you should approach, and how. (See the sampling types in the section on Interview Participants in Chap. 5.) These design considerations related to data collection are more compounded by the fact that most of the research practicalities are effective in the theoretical decisions about the tumultuous process of gathering qualitative data.

The data collection aspect of qualitative research designing is a crucial intersection of theoretical and practical concerns. You need to decide about the types (quality) and scope (quantity) of the bodies of data to be collected. Based on your understanding of the research question and considering the general contextual and practical conditions and limitations, you decide on a data collection 'plan'.

In a study that focuses on an aspect of classroom interactions of intermediate foreign language learners, you may decide to gather three bodies of data through different procedures: observation and recording fieldnotes, reflective diaries of the classroom teacher and students, and informal interviews with selected participants.

Although you do always live with the open, heuristic, and flexible nature of qualitative inquiry, as part of research designing, it is inevitable to also decide what educational institution(s) to focus on; what class(es) and how many of them to observe; how many observations to do, in what period of time, and with what intervals; what kind of reflective journals and how many of them to collect, in what medium; and how many students to interview, and how.

It is difficult to fix such a plan and expect to implement it bit by bit, but it is more difficult not to think about such a plan at all and embark on the practical process of research. Obviously, this preliminary planning can be modified and complemented in the actual process of data collection but the basic plan—and more importantly, the idea of planning—for the data collection process is an indispensable part of research.

As can be imagined in the case of this example, many theoretical aspects of the research issue under investigation as well as numerous practical considerations about people, places, logistics, budget, gatekeepers, etc. should come together in designing this aspect of research. Moreover, as seen in the next section, these data collection designing decisions need to be interwoven with your data analysis approach.

Data Analysis

Obviously, when you plan for collecting data, you also need to think about data analysis. Therefore, the general analytical approach should be determined. It is true that the research question determines the type of data you gather, and the nature of data determines your analytical approach. However, your particular idea of a prospective analytical approach can also influence the details of how you collect data. For instance, if you plan in your designing to understand and report the research findings in the form of anecdotes and through narrative analysis, your interviews should also be planned to be conducted in the form of extended narrative interviews. How long your data analysis will last and the tentative timetables of the data analysis process should also be considered. As part of the research design, it can be helpful to think about when you will specifically focus on different data bodies for the purpose of analysis. Practicalities of data analysis and facilities (like computers and software in the case of computer-supported data analysis) should also be considered. Moreover, designing the study should include some planning about how the findings that emerge from different bodies of data are to be put together in a coherent whole.

Research Quality

The three categories of research design issues discussed in the previous sections are interwoven but can be considered as belonging to roughly distinct stages of research. However, there are other points that should be part of a researcher's ongoing underlying concerns about the spirit of the entire study throughout the research process, and specifically in the process of designing a project (Flick, 2004; Maxwell, 2013). The extent to which you want to be limited by your particular research approach is one of these points. You should see if you want to pursue heuristic and exploratory goals to be able to explore your research question more openly, or you want to stay more focused on addressing your question. Another underlying issue about your research design is to think about how your research approach defines the relationship between the researcher and the researched. The distance between you and the research participants, the extent to which you recognize them as co-constructors of meanings in your research process, and how much you want to rely on their understandings and attitudes are the concerns in this regard.

A further concern about designing your research is related to issues of ethics in qualitative inquiry. This cannot be put as an element into a step of your study like data collection, analysis, or reporting, but needs to be there with you in all decisions you make about every step of the inquiry. (See the section on Ethics in Qualitative Research in Chap. 9.) Finally, as an ongoing consideration underlying your designing, you need to be concerned with the quality of your qualitative research. There are no fixed steps to incorporate in your research design and there are no checklists to tick when you do the different steps of research. The rather challenging considerations about the meaningfulness and quality of your qualitative research should be embedded in all your thoughts and plans when you design the study beforehand and also when you modify the research design throughout the process. (See Chap. 9 on The Quality of Qualitative Research.)

Practicalities

Designing a qualitative research project is not all about philosophical concepts and theoretical decisions. Mundane practical considerations sometimes overrule your sophisticated plans and decisions simply because they are not practically doable. Perhaps the first practical consideration in designing the study is time. In any academic research—regardless of the institutional type and context of your study—and even in 'qualitative inquiry outside the academy' (Denzin & Giardina, 2014), you cannot continue the project forever or for any period of time that you wish. Therefore, you have to design the study within certain time limits. In many cases you may need to abandon a large part of a nice research idea because you cannot address them before the deadlines. The timing aspect of research designing is even more important when you are doing something like a student project or a graduate thesis.

Related to the question of time is the issue of place in designing a study. Where do you need to go and how? The physical location of a study is one side of this and the issue of access is a more complicated side. (See the section on "Access and Gatekeepers" in the next chapter.) You should also consider your co-researchers: the skills and abilities of the researcher and, basically, the number of people who are involved as researchers—in student research, although you have the theoretical support of a supervisor, you are probably alone in dealing with practicalities. Moreover, researchers need utilities and equipment. An important aspect of designing a study is to plan for providing and using the required facilities of different types; from simple papers and pencils, to recording instruments, to more complicated computer hardware and software. And last but by no means least, think about money. Time, access, researchers, and facilities—and, therefore, the entire research endeavor—can be planned only with an eye on the budget and how much you can spend for your project. All of these practicalities need to be taken care of in your preliminary design as well as later adjustments (Knapp, 2017).

Take any published qualitative study and see how the multiple elements of theoretical bases, epistemological considerations, contextual understandings, and practical limitations are interwoven in the form of a coherent whole of a research design. The plan that can be seen as underlying the phases and steps of the research project illustrated in a research report is the actual design of the study. Each and every qualitative thesis or journal article can provide an instance of a retrospective image of a research design as the product of a challenging qualitative designing process.

To deepen your conceptual understanding of qualitative research designs and to hone your ability in designing, you should pursue three interconnected involvements: First, read theoretical discussions like this chapter. They give you the opportunity to reflect on various aspects of the issue and to develop an idea of research designing. Second, see as many published research reports as you can—most accessibly and diversely, journal articles—through the eyes of a researcher rather than a mere research audience. They provide instances of designs that have been shaped through actual challenging processes of research designing. Third, do your own designing and experience it in the trial and error process of mini projects.

Any study is just one instance of possible qualitative research designs which is probably unique in its specific configuration. It is next to impossible to exactly replicate a true qualitative research design. Moreover, what we can see in any research report is the snapshot of the final configuration of the design. The actual process of designing remains invisible. As you may have noticed, issues of flexibility and balance discussed in Chap. 2 are particularly relevant in research designing (Koro-Ljungberg & Bussing, 2013). All issues of purpose, theory, data collection, data analysis, quality, and practicalities are considered in an early design before you practically embark on a project. However, you can never fix it. All the possible changes of track that we observed in the example of planning a weekend trip earlier in this chapter can happen to your design in a qualitative study. So, meaningful flexibility is obviously necessary. As for balance, in order for the preliminary design to meaningfully facilitate rather than hinder the progress of a project, the design needs to strike a balance between too loose and too tight a plan. Overly open plans that leave too much to be decided along the way may not help in addressing your research questions and are very difficult to practically implement. On the other hand, too much calculation and fixing the details in the form of a blueprint probably disappoints you because unexpected things naturally tend to happen. Moreover, too rigid designs can deviate from the qualitative, context-sensitive, and fluid nature of qualitative inquiry.

Qualitative Research Traditions

Given the nature of qualitative research designing, rather than looking for and adopting set frameworks and blueprints, you can become better in designing by gaining more ideas and experiences in this regard and by thinking more and more about aspects of your own study. One way of gaining more designing ideas is to know more about qualitative traditions. In qualitative research literature, you face more than a dozen titles and labels for different approaches (e.g., ethnography, phenomenology, ethnomethodology, and narrative inquiry). Beginner readers may think that these labels signify coherent research frameworks with distinct packaged ways of all steps of a study from a topic into the details of dealing with data and up to the format of reporting the research. Such an assumption may find endorsement in the literature as well (Jacob, 1987). However, it would be helpful to know that all the different names of qualitative approaches do not necessarily denote coherent, independent, and distinct research methods (Atkinson, Delamont, & Hammersley, 1988). They are traditions with huge overlaps that all come under the umbrella of naturalist, interpretive, and constructivist epistemological perspectives.

The reason why similar epistemological positions have been conducive to so many different names and labels might be the fact that these different traditions have developed in different times in history and places in geography. Some of these traditions like narrative research, ethnography, and discourse analysis are better known in language education (e.g., Barkhuizen, 2011, 2020; Barkhuizen, Benson, & Chik, 2014; Duff, 2013; Duff & Bell, 2002; Lin, 2014; Wei, 2020). Other names such as grounded theory, phenomenology, ethnomethodology, autoethnography, duoethnography, qualitative content analysis, ethnography of communication, and symbolic interactionism are less heard of or rare in our field, although they are relatively established in qualitative research literature (e.g., Charmaz, 2006; Flick, 2014; Hadley, 2020; Lowe & Lawrence, 2020; Mirhosseini, 2018b; Starfield, 2020; ten Have, 2004; Trainor & Graue, 2013). Apart from the extensive overlap among different traditions in what they address, there are also commonalities among some approaches in bypassing some aspects of research and focusing on others.

However, in designing qualitative research, awareness of the perspectives and focuses of these traditions may be helpful. Each qualitative project has its own unique design which is the result of a unique contextualized designing process, but common experiences and patterns of similar problems to tackle and similar decisions to make are reflected in research reports that can be consulted. There have even been suggestions about a number of basic prototypical designs like case studies, comparative studies, and longitudinal studies that can be points of departure in qualitative designing (Flick, 2004). This might be a reductionist view of qualitative research designing but it can be a helpful idea to look at patterns that exist in published qualitative studies—in the area of language education as well as other disciplines like sociology and psychology—and view them as sources of insights and ideas for research designs. Because qualitative research is still not widely embraced with all its diversities in the field of language education, beginner qualitative researchers may begin with something like a "basic qualitative study" (Merriam & Tisdell, 2016, p. x).

Mixed Methods Designs

In the context of applied linguistics and language education research, the so-called mixed methods research designs that combine quantitative and qualitative procedures have attracted particular attention (Hashemi, 2020). This extensive—and perhaps ironic—attention has been to the extent that before a widely used guidebook on qualitative research specifically written for language education researchers, textbooks on mixed methods language teaching research have appeared in the field (Brown, 2014; Riazi, 2017). The idea in mixed methods research is that positivist knowledge and quantitative research techniques can be put together with contextualized knowledge and procedures of qualitative inquiry to address research questions more profoundly and comprehensively. In practice, this has led to obsession with design issues and the technicalities of combining the two sets of techniques. However, novice language education researchers should consider the fact that you need to gain in-depth understanding of the content of the two sides of the mixture before you immerse yourself into the challenge of mixing them.

Assuming that due attention is paid to the quantitative and qualitative sides of mixed methods research, when it comes to designing the combination, Dornyei's (2007) chapter on mixed methods research designs in applied linguistics research has been adopted relatively widely in the field. Referring to a few other scholars, and based on the two notions of sequence and dominance, he proposed different types of designs for mixed methods research designs. It is argued that the quantitative and qualitative parts can be done concurrently or one following another. Moreover, they can be conducted with equal weight or one can be given priority and more weight over the other. Taking all the possible combinations of concurrent or sequential and equal or unequal weights for each side, Dornyei proposed nine designs that have been relatively extensively embraced in applied linguistics and language education.

Although mixed methods language education studies have been increasingly popular in the past few years, they have been epistemologically debatable. I have dealt with such debates elsewhere (Mirhosseini, 2018a) and will not discuss them here as they are beyond the scope of this book. However, I raise a few main points that may be important to be taken note of by new comers to the field or those who have a background in quantitative research and are newly considering the quantitative–qualitative dichotomy. One important concern for such researchers is not to be carried away by the designs of mixing the two research approaches. Regardless of any philosophical problems, if you decidedly want to do mixed methods research, you should remember that the qualitative part of mixed methods studies is *qualitative* research with all its details. Mixed methods studies composed of an extensive and sophisticated experimental design with data from several hundred test takers on the one hand, and only half a dozen ten-minute interviews based on a few factual or yes/no questions on the other, is not mixed methods research by any standards.

A subtler concern is about the very idea of mixing two epistemologically contrasting approaches. Based on the discussion on the types of knowledge and ways of

knowledge seeking in Chap. 1, methods and procedures of research are founded on epistemological positions. Therefore, the base of research is epistemological. A look at the issue of mixed methods from such a perspective tells us that putting research techniques together makes simple amalgamations rather than basic combinations. On the other hand, mixing the two components at the level of epistemological assumptions may prove more complicated than it appears first. Combining a position that cherishes objective exact measures and a position that values subjective and fuzzy contextual understandings is not as straightforward as it may look. The aim of this brief section is not to resolve this issue but to ask beginner qualitative researchers—with or without a background in quantitative research—not to shift to mixed methods too soon. Gain some knowledge and experience of qualitative research, then read a bit about the debate on the epistemological aspects of mixed methods research (Mirhosseini, 2018a), and then find your own stance and act based on your position in this regard.

Questions

- *If qualitative research is open and fluid in all its aspects, what is the use of a design? Is it not the case that the research design fixes and limits the project and does not allow for context-sensitivity and subjectivity as essential elements of qualitative research?*

Although it might appear to be a paradoxical endeavor to formulate an a priori design and at the same time keep the designing process open throughout the study, the endeavor is indispensable in qualitative studies. It is almost impossible not to do any planning before starting an inquiry, like it is also almost impossible to fully fix a plan to be exactly implemented in a project. Perhaps an important part of resolving such an apparent paradox is to try and get rid of the sediments of positivist conceptions of research design that we might have caught either through mainstream academia or as public attitudes through general education and media. A re-conceptualization of the notion of research *designing* in a close-to-life qualitative way will help in resolving the issue.

- *Is it desirable in qualitative studies to use a previously conducted study as a model and replicate the design that has already been implemented?*

It must have been obviated by this point in this book that the so-called replication of previous studies is out of question in qualitative research. Given the crucial role of contexts in shaping the theoretical and practical sides of qualitative research, one can hardly think about replicating the contextual features of a previous study in terms of individual characteristics of people, interpersonal relationships, and other features that create the overall climate of the study (Casanave, 2012). However, it can also be argued that at an abstract level, there can be similarities among how actual research projects finally turn out to be implemented. Therefore, the more we read and know about previous studies, the richer our repertoire of strategies that can

be potentially applied in different research settings and in making decisions about emerging issues during the research process. Each one of the various traditions and types of qualitative research with all their diverse terminology is in fact one way of providing cumulative experiences of how constructivist epistemological positions can be translated into methodological and practical aspects of qualitative research.

There have even been suggestions about abstracting possible research approaches into the form of a few prototypical research designs that can be relied on as early frameworks in designing qualitative projects, especially for novice researchers. Flick (2009) has suggested case studies, comparative studies, longitudinal studies, etc. as some of these basic designs. We need to bear in mind, however, that the specific theoretical considerations in any particular study, the many contextual details, the worlds of the particular participants, who the researchers are, and minor practical details in any setting which are never the same at two points of time, should all come together in designing a specific study. Even if you start form an idea of a research design already existing out there, when all these unique contextual features are included and reshaped by the researcher's creative decision-making, the actual design of any qualitative study, which is fully shaped only at the end, is unique.

- *Is there any ideal scope (e.g., in terms of the number of participants or the types and size of data bodies) to be considered in designing a qualitative research project?*

Like many other questions raised by beginner qualitative researchers, this question is also possibly rooted in an inclination toward, or at least familiarity with, quantitative research. In quantitative studies, each selected design dictates certain types of data, specific analytical tests, as well as an optimum and minimum number of groups of participants and members in each group. In qualitative research, there can be no such sweeping requirement or suggestion about the scope of a study. The scope of preliminary qualitative designs as well as later refinements can be seen as placed on a very diverse spectrum; from a single type of data about a single participant in one event, all the way to several types of data, about hundreds of participants, in multiple settings or a wide geographical area over a long period of time. Even the smallest possible study may be justified based on the depth and quality of explorations. Therefore, the scope of a qualitative study is shaped by many considerations including the purpose of the research, the actual features of the research setting and participants, the meaningfulness of the gained findings, and practical constraints.

- *How can an understanding of different qualitative traditions and approaches help with designing research projects?*

An important aspect of the preliminary designing of a project is *anticipating* the expected process of research at different stages. Moreover, the later fine-tuning of the designing features of qualitative studies are based on the theoretical orientations and the practical progress of dealing with contexts, participants, and data. Almost all of these aspects of research can be directed by the methodological approach adopted by the researcher. Understanding qualitative research traditions and approaches can shape the basis of researchers' methodological understandings, preferences, and decisions. Apart from shaping the theoretical attitudes,

orientations, and understandings underlying your research, the qualitative tradition with which your research is associated can influence the data collection process in terms of types, depth, and contextual situatedness. But more prominently, as we will see in later chapters, different qualitative approaches specifically make a difference in your data analytic approach in exploring and making sense of data (Flick, 2014). Perhaps one of the first manifestations of all these influences is reflected in the preliminary designing of your study.

- *Does the use of numerical data as part of a qualitative project count as mixed methods research?*

Quantitative research is known for working based on measurements and numerical data, and qualitative research for relying on verbal data. Perhaps that is why, from a distance, any form of the application of numbers is labeled quantitative research and any claim of using verbal descriptions is labeled qualitative. However, it must be noted that the essence of quantitative research is probability testing based on positivist epistemology which is represented in mathematical calculations. On the other hand, the essence of qualitative research is contextualized explorations based on constructivist epistemology, represented in verbal descriptions and explanations. Not all types of handling verbal information qualify as qualitative research and not all types of the application of numbers means positivist research. Frequency calculations, percentages, and tables of numerical information do not necessarily represent probability tests based on positivist assumptions. They can be part of the required information for an in-depth understanding of a research issue in its context. Therefore, numbers do not necessarily mean quantitative research, and their presence in a qualitative study is not necessarily an indication of mixed methods.

Further Reading

- **Mason, J. (2002).** *Qualitative researching* **(2nd ed.) London: Sage. (Chapter 2,** *Designing qualitative research*)

In the chapter devoted to qualitative research designing, Mason first raises the question of the necessity and possibility of designing qualitative research. She argues in favor of both but reiterates a need for understanding the issue of design in 'qualitative ways'. "Thinking qualitatively means rejecting the idea of a research design as a single document which is an entire advance blueprint for a piece of research." (p. 24) Mason does believe, nevertheless, that designing at the beginning is needed. The chapter discusses the need for creative planning and on considering the links between research questions and methods in designing qualitative research. More specifically, the chapter focuses on the importance of anticipating the steps and stages of research in this regard. The author also addresses issues of quality, ethics, and practicalities in qualitative research designing.

- **Flick, U. (2007).** *Designing qualitative research*. **London: Sage. (Chapter 4,** *Qualitative research designs*)

This book by Flick covers almost all aspects of qualitative research from some preliminary theoretical discussions up to data analysis. However, *designing* is the flashing word in the title, and this can be an indication of the overarching conception of the notion of design in qualitative research. Moreover, the book contains a chapter specifically devoted to qualitative research designs, in which the author specifically focuses on the importance of designs in qualitative studies, the designing process, and the features of good qualitative designs. The author argues that unlike the notion of design in quantitative research, in qualitative approaches the concept of design is a vague one and, therefore, a primary need for qualitative researchers is to construe the concept as "an orientation for planning and realizing qualitative research without sticking too closely to the understanding of the term familiar from quantitative research" (p. 37). The chapter discusses lists of components and influences that are to be considered in designing qualitative research and proposes some basic designs along with examples.

- **Flick, U. (2009).** *An introduction to qualitative research* **(4th ed.). London: Sage. (Chapter 12,** *How to design qualitative research: An overview*)

In this chapter, Flick focuses on a 'how to' type discussion of qualitative research designs. Departing from a general conception of research design as planning a study, he argues that such a planning includes a few major dimensions all aimed at addressing the research questions: thinking about settings and participants, deciding about the collection and analysis of data, and considering the logistics and practicalities. The author argues that almost all aspects of research are related to the design of a study, including goals, theoretical frameworks, research questions, data, procedures, and resources. The chapter then elaborates on some basic qualitative research designs that can be points of departure in the process of designing qualitative studies. Flick specifically focuses on the four basic designs of case studies, comparative studies, retrospective studies, and longitudinal studies. In each case, he discusses the contributions as well as the challenges and shortcomings of the particular design.

- **Yin, R. (2011).** *Doing qualitative research from start to finish*. **New York: Guilford Press. (Chapter 4,** *Choices in designing qualitative research studies*)

The chapter starts with an explication of the fact that any study has a design, that is a plan, although it may be sometimes implicit. "Qualitative research also has designs, but not any fixed types or categories of designs." (p. 75) Then, Yin extensively explains eight considerations—that he calls procedures—about which researchers can think and determine their position and attitude: preliminary designing, taking care of validity, clarifying data collection processes, deciding about sampling, considering the theoretical bases, considering participants' reflections, deciding about the generalization of findings, and fixing a research protocol. Recognizing that qualitative researchers might resist the idea of designing, the author makes it clear that the eight propositions are suggested 'choices' rather than strict requirements. However, he reiterates that thinking about these aspects of research designing increases the potential of the study in properly addressing the research issue of your concern.

- **Maxwell, J. A. (2013).** *Qualitative research design: An interactive approach*. **London: Sage.**

Maxwell devotes an entire book to various dimensions of the design of qualitative research and how designing touches almost all aspects of research. In the first chapter, he proposes a general 'interactive model of research design' developed based on the five components of goals, conceptual framework, research questions, methods, and validity. Each of the components includes a number of issues which are then put in a rather complex web of interactions that shape the overall design of qualitative studies. In the rest of the book, an independent chapter is devoted to a set of concerns under each one of these five components, before a final chapter on research proposals: different types of goals in qualitative inquiry; the importance of theoretical and conceptual foundations; the nature, types, and importance of research questions; processes, procedures, and practices of collecting and analyzing data; and issues of qualitative research validity and generalization.

- **Knapp, M. S. (2017). The practice of designing qualitative research on educational leadership: Notes for emerging scholars and practitioner-scholars.** *Journal of Research on Leadership Education, 12*(1), 26–50.

Knapp's article first highlights some weaknesses in methodological discussions about qualitative research designing, specifically in the area of educational leadership. Then, he presents an overview of different standpoints about research designs in qualitative traditions. On this basis, and making a distinction between the 'intended' research design planned by the researcher and the 'enacted' emerging design that takes shape along the way, the article focuses on the process of designing qualitative studies in terms of four themes: the 'iterative' and ongoing nature of designing qualitative studies; the interactions among different aspects of research in a proposed 'design triangle'; tackling the emerging challenges and making decisions about various practicalities listed in a proposed 'design menu'; and recognizing and acknowledging the limitations of qualitative designs. Finally, the author discusses some messages of his conceptualization and proposed process of qualitative research designing for beginner researchers and their supervisors.

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Chapter 4
Collecting Data Through Observation

Conducting research is all about addressing research questions based on different types of evidence. The actual process of research and the practical engagement with the context of inquiry starts with the researcher's attempt at collecting such evidence that can be used to gain further understandings about the research issue. In academic research, this kind of evidence is generally called *data*. In quantitative research, the desired type of research evidence is based on measurements and is represented in the form of numbers. Each number that represents a piece of such evidence is referred to as datum, the plural form of which is data. In qualitative research, the word data is interchangeably sometimes used as a plural noun and sometimes as a singular one, but in any case, based on constructivist epistemological positions, the nature of data in qualitative inquiry is fundamentally different from what digits can communicate (Flick, 2018).

Perhaps the most important feature of qualitative data is contextual situatedness. The evidence on which qualitative researchers rely in addressing their research concerns should necessarily reflect the essence of phenomena as they are constructed in their actual setting and based on participants' perspectives. There are numerous ways to collect such contextualized data in qualitative inquiry, but prototypical qualitative data is gathered through participation in real-life contexts of concern and recording events along with experiencing them. Gathering naturally occurring bodies of data through participation and observation is perhaps the best way in tackling many language education research issues ideally based on naturally occurring events and experiences of language learners and teachers. Therefore, this chapter dwells on data collection through observing language teaching and learning events, especially in classroom settings. Eliciting qualitative data in the form of interviews and collecting other types of evidence in qualitative language education research is discussed in the next two chapters.

Participation and Observation

As it must be clear by now in this book, the consideration of fuzzy and complex mentalities, characteristics, and acts of people in their own life context is a crucial feature of qualitative inquiry. Therefore, in search of evidence that can help us tackle a research question in a certain context—that is, in search of *data*—the ideal procedure is one that situates the researcher in the actual physical and social setting as well as the conceptual context of the investigation. Contexts comprise not only physical settings but also extremely complex personal, interpersonal, and social relationships that are best captured through involvement and membership. Moreover, beyond specific settings, contexts of social involvements like language education include the wider climate of the surrounding societal, economic, and political environment (Elliot, 2015). Therefore, in collecting qualitative data, the ideal procedure is participation in and/or observation of research participants in the research *field*—a frequently used term close to what I refer to as context.

Participation in the research context involves certain extents of membership; one or another kind of observation; and different types of reflection on actual life events in the field. The evidence that is examined in qualitative research can be gained from outsiders' view of what goes on in a context and interpreted form a distance, or from an insider's situated observation and understanding. Although a total insider's view may be far from the reach of a researcher—and not necessarily desirable even if it is achievable—it can be approximated by qualitative researchers situating themselves within the actual research context. "The key concern is understanding the phenomenon of interest from the participants' perspectives, not the researcher's. This is sometimes referred to as the *emic* or insider's perspective, versus the *etic* or outsider's view." (Merriam & Tisdell, 2016, p. 16)

Obviously, the ideal contextualized evidence can be gained only through emic understandings of nuances and the intricate construction of the material, emotional, and mental lives of all participants. The desire for approximating an emic view of the research context is reflected in the classic ethnographic research endeavors that relied on researchers' *indwelling* in the entire life setting of groups of people and engulfing the outsider researcher in the actual experiences of the community of concern.

> A qualitative researcher assumes the posture of indwelling while engaging in qualitative research… To indwell means to exist as an interactive spirit, force or principle – to exist within an activating spirit, force or principle. It literally means to live within. Perhaps this dictionary definition can be translated for naturalistic inquiry to mean being at one with the persons under investigation, walking a mile in the other person's shoes, or understanding the person's point of view. (Maykut & Morehouse, 1994, p. 23)

The concerns about outsiders' attempt at embedding themselves into a community as a quasi-insider and the problems with such attempts from the perspective of local community members and the colonial side of this aspect of the history of ethnographic and anthropological research is a serious one but beyond the scope of this chapter (Smith [1999] has discussed aspects of this essential debate for social science researchers.). Regardless of the intentions of the researchers and who they accompany, gaining in-depth understanding of research contexts is best achieved through indwelling in the setting/field/community either as an insider-turned-researcher or an outsider attempting to fit inside. A further consideration here is that the word observation should obviously not be taken literally to mean focusing on what your eyes can see. Rather, it is about feeling and understanding the entirety of the context, and this includes noticing the embedded tacit aspects and observing the unobservable (Tracy, 2020).

Observing Language Classes

In the spirit of community indwelling and research field participation, in language education research, a fantasy ideal procedure of data collection would be indwelling in the *language education life-world* of language learners, teachers, and others. This can include in-class activities; language learning and teaching events and experiences beyond the classroom that may take place through years; and many other processes in the wider institutional, social, and economic context of the society. After all, if we think of a researcher's indwelling in the field of an individual or group involved in language education and we do adhere to the essence of ethnographic traditions (Brewer, 2000; Murchinson, 2010), the context of the inquiry would naturally extend far beyond typical language classroom tasks, textbooks, and tests.

Let's put on the shoes of early anthropologists who initiated what came to be later known as ethnographic research approaches. Regardless of the possible postcolonial critique of what they did and their intentions (Alvares, 2011; Smith, 1999)*, their emersion in the field and their engagement with all aspects of the community that they dealt with may teach us lessons on what it means to collect truly contextual qualitative data.*

(continued)

What are the different aspects of the real context of a study on a problem in learning and teaching English as a foreign language in any corner of the world? From the point of view of anthropologists and ethnographers, even for a research question apparently situated in a minor teaching and learning task inside the classroom, one may think of these possible contextual aspects:

- *In individual learners' minds: cognitive and psychological processes of language acquisition through different learning involvements*
- *In individual learners' hearts: attitudes toward learning a foreign language and feelings toward the particular contexts and people*
- *In mind and heart of the teacher: ideas, thoughts, attitudes, and feelings about English, teaching and learning, and learners*
- *Inside the classroom: the physical setting and materials, teaching and learning activities, and interpersonal relationships*
- *Outside the classroom, in the school or educational institution: educational goals and plans, administrative processes, as well as setting and equipment*
- *Outside the educational institution, in learners' families: ideas and attitudes toward education in general and language learning in particular, social and cultural status, and financial conditions*
- *In the society at large, at the local level: public perceptions of knowing a foreign language and the social and economic functioning of an additional language,*
- *Beyond the local society, at the national level: official policies and unofficial ideologies of language, education, and English language teaching*
- *Beyond the national context, at the international level: challenges over education, language, and identity within the global arena of culture and politics*

It is almost out of question to consider a research 'field' for language education research in a specific context with all these possible aspects included in the collected body of the research data. However, it might be insightful to remind ourselves that beyond mainstream language teaching and learning studies that largely confine themselves to individual characteristics and linguistic forms, the 'context' of language education is complex indeed.

A more realistic but still ideal data collection procedure, however, may focus on *language classroom life* as an important actual setting of what can be called language education context. A considerable body of research on language teaching and learning is contextualized in what happens in language classes (Gieve & Miller, 2006; van Lier, 1997). Moreover, many aspects of language education life which are not observable in the classroom (like things that go on in learners' and teachers'

minds and hearts, family and community issues and attitudes, and different levels of policy and planning forces) can be indirectly reflected in classroom involvements. Therefore, the contextual complexities of many language education research concerns may best be captured through participation in and/or observation of language classes—and this can be extended to contexts like online learning environments and informal learning settings, as well.

Although classroom observation is in many cases an ideal data gathering procedure and many good qualitative studies on issues of language teaching and learning rely on it, observing language classroom events is not necessarily the best way of data collection, or a good one, or even a basically relevant one in the case of all research questions. Like other data collection procedures and like almost any other aspect of different stages of the qualitative research process, deciding to conduct classroom observation depends on your research question. For certain questions, such participation and observation can be the main source of qualitative data; for other questions it may be helpful as a secondary way of data collection because the focus of the research question is not necessarily what goes on in a classroom setting; and for other research questions that address the many possible sides of language education in the wider institutional, social, or economic context of language education, what happens in the classroom setting can bear little important message and the data should be sought somewhere else.

> *To address a research issue related to the opportunities and challenges created by bringing 'critical literacy' perspectives into language education and the construction of critical second language literacy teaching, observing a classroom may be an ideal data collection procedure. How the teacher embeds principles of critical literacy into the practice of language teaching, how language learners encounter criticality along with the challenges of mastering an additional language, and how the theoretical discussions of critical second language literacy translate into classroom interactions can best be examined through the explorations of what goes on inside such a classroom.*
>
> *In addressing a research issue that focuses on the role of EIL and ELF perspectives in preparing audiovisual material accompanying an internationally used language teaching coursebook series, classroom observation can be used as a secondary source of data. The contents of the material of concern are the major body of data to be explored in search of traces of the perspectives of concern. The use of the material in a classroom can be observed in search of additional evidence. However, such a research issue can also be tackled without observation data.*

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In the case of a research concern like language teacher recruitment poli-cies and practices at a national, local, or institutional level, classroom par-ticipation and observation is of almost no relevance. Policy documents and interviews with different groups of informants can perhaps provide the most relevant data in this case. Just because a qualitative approach is adopted does not mean that observation is the best or even a relevant way of gathering qualitative data.

Access and Gatekeepers

Twenty years ago, when I first read Taylor and Bogdan's (1984) *Introduction to Qualitative Research Methods*, although I found it intriguing that they addressed the problem of access in research, it sounded somehow *unacademic* to me to see that they wrote about gatekeepers as an important concern in learning about research methodology. Now, *access* is one of the first considerations when I think about a research question and ponder the design of a project that includes participation and/or observation. Access is simply about being able and/or being allowed to enter a place with the aim of participating in some kind of social involvements or at least observing them and possibly interacting with other participants, taking notes, and/or audio/video recording them.

You have a research question that is best addressed by physically attending a classroom setting where naturally occurring classroom interactions can be experienced, observed, recorded, and reflected upon. So, the next step looks like a straight-forward matter of sitting next to the teacher or one of the students in a language class of your choice and thinking about what to observe and record. However, for this very simple task, one can think of different *gatekeepers* that you may need to tackle before the observation becomes practically possible (Tracy, 2020).

At one level, if you are doing the study in a place where you are a national, eth-nic, religious, linguistic, etc. outsider, obviously you need to prove your credentials to enter another country or a part of your own country where you do not *belong*. Even if your research is in your *home* community, a serious instance of gatekeeping you may face on the way to observing a foreign language classroom is at the insti-tutional level. You may need to convince university officials in the case of foreign language classes or courses of English for Specific/Academic Purposes (ES/AP) in higher education; you may have to secure permissions from school principals or even heads of the department of education of a district or town if you intend to observe a high school language classroom; or you may find it necessary to persuade the director of a language center, foreign language institute, or any other govern-ment or private institution that holds language courses.

This institutional level of gatekeeping is inevitably linked to the next level, that is, the classroom level. After you gain access to a university, a high school, or a language teaching institute, you still need to win the trust of a professor, instructor, or teacher. Although the idea of research may sound just part of life in academia, there are many people who may have no idea of what it is. Especially in places like schools and language institutes, it would be no surprise if people do not know, do not trust, and do not listen to you when you are there for research. You may have to explain who you are, where you come from, what you want to do, why you want to do it there, and what good your activity does to the institution and its members. More importantly, almost always you need to find a way to assure the gatekeepers that you are not going to harm anyone; are not going to disturb anyone's privacy; are not going to find faults; and are not going to be demanding, troubling, or impeding their routine activities.

This can be expected when you are not an outsider to the broader community that hosts the particular educational institution, and the institution is confident that they are not doing something illegal, substandard, or confidential. You may naturally have a more difficult job of gaining access when you are an outsider to the community and you manage to reach the doors of the institution and the classroom only by some official permission. Also, the situation would be obviously exacerbated when something goes on inside the institution that the gatekeepers do not want to disclose, for whatever reason. In the case of classroom teachers, in addition to almost all of these concerns, there is an added problem: they might simply not be comfortable with an outsider in the classroom.

Foreign language institutes can greatly vary in the extent to which they allow their teachers to plan the details of their own teaching syllabus according to their own theoretical knowledge and professional experience. Many such institutes, especially the more established ones, can be quite strict in this regard. In fact, well-known and established foreign language institutes might impose on their teachers even the most detailed items of classroom teaching in the form of a minute-by-minute fixed syllabus.

It can be a brilliant research idea to investigate the notion of language teacher agency within the actual classroom life of language teachers at such language institutes. You may develop a neat research plan of observing a few classes to address such a research issue. It is only later that you discover that the institute does not grant permissions for the observation of their classes. Then, your research design has to be drastically revisited. Regardless of how great the research idea is, if the institute also bans its teachers from taking part in research interviews about their classroom practices, you may have to totally abandon your brilliant research idea for a 'simple' problem of access.

I do not intend to provide detailed instructions on tackling gatekeeping situations and gaining access to a setting where you can do the observation for your qualitative language education research, as Taylor and Bogdan (1984) did in their classic book and in its later editions (Taylor, Bogdan, & DeVault, 2016). However, there are a few points that might provide some insights into the issue of gaining access when you are thinking about designing your study at an early stage as well as later design modifications. Obviously, the first step is to negotiate, explain, and answer questions in order to win the trust of gatekeepers. You may even be able to convince them that your research can benefit their activities and institution, and perhaps the society in general. If the negotiation fails, and possibly along with it before a possible failure, see if you can find connections. Partial insiders and those who are in a way close or known to the gatekeepers can carry the burden of much of the negotiations. If there are multiple and similar settings each of which can equally serve as your data collection place, the ones where you can find better connections can be your priorities in selecting the research site.

If you find friends, acquaintances, known insiders, or at least gatekeepers or insiders who are familiar and less suspicious toward academic research, you will be a long way ahead in your negotiations. With such connections, many of their questions about you will be already answered; most of their question marks about what you want to do will be more easily removed with a simple explanation; and many potential questions—which can otherwise bother them and you—will not basically come to their minds. In your negotiations for accessing a research setting—regardless of who you negotiate with—top ranking government officials, institutional managers, departmental officers, head teachers, classroom teachers, or even young students in the classroom that you want to observe—try to tell them what you want to do in their language and do not tell lies (see the section on Ethics in Qualitative Research in Chap. 9.), but remember that you do not need to tell them everything about your project when there is no obligation (Ruecker, 2017).

How to Observe

Early attempts at classroom observation may be experiences of confusion that overwhelm the novice observer with an ocean of all sorts of acts, words, and images that seem impossible to focus on, to record, and to interpret. Therefore, an inevitable question is about what is to be done in the act of observing a language classroom setting. In addressing this question, before practical considerations, there are two preliminaries to be noticed. First, perhaps most obviously, observers need to see, listen, and feel with all their senses and with all but an obsession with the details of what people say and do as well as the details of the material aspects of the setting.

Second, beyond the surface, one needs to understand observation as an *active* process rather than a passive mechanical procedure. The passive recording of events in the field can be carried out by various equipment that are nowadays used with increasing ease. A researcher-observer should, therefore, observe beyond what can

be *seen* by a camera. This *act* of observation includes positioning oneself in the sociocultural and interpersonal milieu of the setting; noticing the unobservable clues and cues that hint at attitudes and understandings of the participants; and maintaining a constant investigative and reflective attitude toward the ongoing life of the participants in the particular context of observation.

Apart from these two points of departure, to move out of confusion in observing a language classroom context, the light to follow is your research question and the profound understanding that you have already developed about it. The observation process is aimed at gaining contextual understandings of what goes on in the classroom *and* keeping records of what is observed and understood for later contemplation. This broad aim is directed by the research question. As discussed in Chap. 2, the research question is supposed not to restrict the researcher's view to a tunnel vision, but a good qualitative research question does possess the potential to direct and orient the research process at different stages, including during the stage of data collection through observation. Therefore, when considering the practical tips discussed in the rest of this chapter, one should always keep in mind that the overarching guide is the research question.

One more point that may need elaboration before we move to the more practical aspects of observation is about the positioning of the researcher-observer in the context of observation. The two extreme positions that may be imagined for an observer is a complete outsider that observes a context with no participation on the one hand, and a full participant in the context that also tries to observe it as a researcher, on the other. It is both practically difficult and conceptually problematic to maintain either one of these positions. This is an important instance where the notion of balance would help in the process of qualitative inquiry. Researcher-observers need to situate themselves in the context based on a balanced position on the continuum between the two extremes of complete outsider and full participant. (See the section on "Observer's Paradox" later in this chapter.)

Mind Your Question

In the entire process of data collection, including the observation process, although a holistic understanding of all aspects of the research context is an essential feature of a truly qualitative approach to inquiry, the focus should be on the research question. What counts as contextually relevant is whatever aspect of the setting that can be linked to the research question. For later contemplation, reflection, and deliberate exploration, even minimally relevant elements of what you see, hear, and feel need to be considered, reflected on, and possibly recorded. However, you do also need to ignore many things that cannot be meaningfully related to your research question. In other words, you need to constantly consider aspects of the ongoing streams of data in the language classroom of concern that can actually serve as potential evidence to be applied in addressing the research question. So, your observation would be different with different research questions in hand.

Therefore, how you understand the events in your observation, relate them together, reflect on what you observe, analyze and synthesize different elements of what you observe, make early interpretations, and make decisions and modify your observation (and generally, your research path), as well as how you record your fieldnotes and memos, are all oriented by your understanding of the research question and what you intend to know about a particular research context. From the early stages of observation, you should reconcile two apparently opposing feelings: on the one hand, the contextual complexity and its inevitable accompanying confusion is difficult to fully avoid, and on the other hand, you should constantly maintain that what you are seeing and thinking—that is, your observation—is geared to addressing your research question.

(De)familiarize

With a qualitative stance and based on the recognition of your subjective positioning as a researcher-observer and with a profound understanding of the research question, how you see and what you think about the events should be constructed by yourself. Therefore, you are the one who determines and *defines* what to focus on as important, and what to ignore as irrelevant in your research setting. An important aspect of this independent and self-defined observation is that throughout the process of your observation, in Tracy's (2020, p. 143) words, you need to be "making the familiar strange and the strange familiar". On the one hand, in making the familiar strange, try to see mundane and normalized activities as special and worth reconsidering so that you can go beyond taken-for-granted understandings and toward renewed and generative perceptions. On the other hand, making the strange familiar happens when you come to apparently special and attention-grabbing events, acts, or deeds. If they are irrelevant to your research question, ignore them and do not be distracted. If they are relevant, see what they mean to you rather than being captivated by their bizarre appearance.

> *Take the example of critical second language literacy teaching which I mentioned earlier in this chapter as a research issue which can be explored through classroom participation and observation. When you observe the classroom environment, you see everything that goes on in the classroom and perhaps audio and/or video record everything. However, because you should 'mind your question', you need to focus on critical literacy only and (de)familiarize the events that you observe accordingly.*

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If, for example, you see what looks like an innovative memory game that the teacher employs in dealing with the new words in a textbook and it makes you curious about how you can use it in your own teaching, it can be an instance of a strange thing you need to familiarize. If it lights a bulb in your mind about critical literacy, see it from that perspective. But do not devote your 'observer attention' to such an eye-catching event for what it means in terms of memorizing words. If it catches your attention just as a memory game (and not because of its relevance to your research question), try to see it as something ordinary that can be by-passed. Otherwise, your attention, field-notes, and possibly, later analysis might be distracted from your research question.

On the other hand, a topic like the biography of a famous figure that is a frequent topic of readings and class discussions may appear too familiar to focus on as an observer. However, your research question requires to make it strange and to look at it from a different angle, because the nature of such an ordinary topic and the type of class discussions about it can be indicative of important considerations from the perspective of critical second language literacy education.

Search for Meanings

Although in the process of observation the focus is on gathering data rather than interpreting them, the processes of collecting bodies of data and making sense of them are not strictly separate ones in qualitative research. Therefore, observers naturally keep an eye on what they understand based on the collected observation data (Murchinson, 2010). Part of this tendency to analyze data is inevitable as you naturally notice connotations, nuances, interconnections, similarities, and differences, and make inferences based on noticing them. In addition to this uncontrolled analytic tendency, you may also need to purposefully attempt to look at your data from the perspective of data analysis. I am not suggesting the start of all-out data analysis at this stage but the partial analytical look during the process of data collection can help you stay on the right track in collecting data bodies which are relevant to your research question. This will also prompt further reflection on the theoretical side of your study and possibly further reading. As a result of such a data analytic view and the related theoretical reflections, you may even decide to make modifications to your research questions, to your plans for data collection, and to the data analysis provisions set in your research design. Moreover, this early marginal data analysis can act as a preliminary step that facilitates the research process in a later stage when you focus on data analysis.

Avoid Distractions

While you need to learn how to observe in terms of what to focus on, you may also need to learn how to avoid distractions and what not to focus on. Part of this is reflected in making strange things familiar discussed earlier. Another aspect of distractions may lie in too much participation and decreased focus on observation, which will be elaborated on in the section on "Observer's Paradox" below. A further dimension of distractions that are to be avoided in the process of observation is related to the partial attention to preliminary data analysis and meaning-seeking attitude advised above. While keeping an eye on data analysis is potentially helpful in different ways, being carried away by your early analytical ideas may shape a very important hindrance on your way to collect rich data.

   As we will see in chapters on data analysis later in the book, in later stages of the project, exploring and making sense of the collected data may take different shapes mainly including emerging categories of different data segments or interconnecting different parts of data in the form of storylines. Both of these exploratory attempts at making sense of data can partially happen while the focus is still on data collection. If the researcher-observer pays too much attention to the emerging categories or storylines during the observation, they may act as distractors. Perhaps the most important pitfall created by such distractions is that the observer may ignore possible alternative exploratory patterns that may also exist in the observation context. The observers may, therefore, observe just to gather further data in support of their early analysis, rather than real evidence that may address the research questions in other ways. Tracy's (2020) clear advice at this stage is: "As much as possible, describe first and analyze second." (p. 147).

Avoid Labels

In years of education and scholarly activities we deal with plenty of theoretical notions, concepts, and categorizations, each with their own *labels*. Naturally, in perceiving, thinking about, and interpreting the theoretical as well as practical issues in language teaching and learning, we rely on the concepts and definitions we have *lived by*. This might sound helpful in quickly interpreting the otherwise complex interactions and events in a classroom context but this very ease signifies at least two threats to your observation. First, as discussed in earlier chapters, many of the familiar notions in language teaching and learning are rooted in positivist epistemologies that have been transferred to the field of language education through the disciplines of psychology and education. Your hurry in labeling what you see in observations with familiar labels might push your understanding of the context into a positivist realm that is at odds with the epistemological basis of the kind of constructivist knowledge that you seek.

Second, even if you manage not to see the classroom context in terms of positivist labels, the very attitude of lumping complex classroom interactions and events into labels like good, bad, helpful, unhelpful, interesting, dull, etc. denies you the opportunity of noticing the subtler components embedded in these events. Instead of naming and labeling lumps of what you see with whatever broad titles or evaluative marks, and instead of even thinking about them in terms of labels, try to go into the details of what you observe within the events. If what you see resembles or reminds you of some familiar notion and if you think you tend to evaluate it in a certain way, try to go beyond that and think about what specific features and elements are there that remind you of a particular label or make you evaluate it in that certain way. Focusing on these embedded details might then convince you to see the entire issue in a different way from what you first thought and might help you evaluate it differently. This observation attitude should be reflected in your fieldnotes as well. (See the section on "Fieldnotes" later in this chapter.)

There are two important types of labels that can easily distract you from observing the depth of what goes on in the context under observation and illustrating them in your notes. The first type comprises general evaluative terms and adjectives that are used to label and categorize people, attributes, attitudes, etc. These include labels like good, bad, lazy, brilliant, successful, weak, strong, shy, silent, noisy, active, passive, indifferent, interesting, boring, etc. Rather than jumping to one such label—in your thought and/or in your notes—try to concentrate on the details of the specific observation that has directed you toward a label.

The second type of labels are technical theoretical terms from the literature of applied linguistics and language education. For example, in a classroom environment where learners are expected to be active, you think their involvement and activity in their group work is less than what you expect. Then you quickly ascribe this to something you have already read about learner 'motivation', and think—and write in your notes—about 'demotivated' students. This very labeling pushes you into interpreting all instances of learners' disengagement with classroom activities in the rest of your observation based on the bulk of theorizations about different kinds of motivation.

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This may prevent you from realizing that the various instances of learners' occasional unwillingness to actively participate in classroom activities during several weeks of your observation could be triggered by a variety of other reasons like their lack of concentration because of a hard exam in the afternoon; the dislike or fear that the teacher has caused among the students; the irrelevance of the textbook topics that are inappropriate for their age; peer challenges and bullying problems; many different individual problems at different points in time; or even the uncomfortable seats in a classroom. All these can exist despite the students' basic motivation to learn a foreign language.

Both of these categories of labels on the one hand push your thinking during the observation process into fixed frames and reduce your chance of noticing novel aspects of what you observe. On the other hand, the labels naturally find their way into your recorded notes. Therefore, rather than uncovering the underlying meanings and providing new insights, you will confine your later thinking and analysis of the recorded data to the earliest categories and labels that occurred to you. Therefore, avoiding the labeling power of words can be a way to see more and record more of the actual spirit of events in a given context.

Assess Your Observation

Despite your every attempt, threats to your observation are many. Problems and gaps in your theoretical understanding of the topic, a loosely constructed research question, and a problematic research design, as well as many other possible distractions can bug the observation process. Researcher-observers need to beware of an empty, fruitless, and meaningless observation attempt. Both during the observation sessions and in the intervals between them, constantly evaluate and reflect on what the observation is doing for your research. You may be carried away by too familiar or too strange events in the field; you may be captured by labels and clichés in your understanding of the events; you may fail to see any sense or meaning and any emerging pattern related to your research question; you may be too much entangled with your preliminary findings; your record-keeping procedure may be problematic; and you may basically find out that observation is not really the type of the data source that can address the research question. Therefore, you need to continually assess your own observation in search of possible pitfalls and amend the process.

Look for Ideas

Observation not only provides data, but also generates ideas for other theoretical and practical aspects of the entire research project. During the observation process, with all the challenges and multiple considerations that are aimed at constructing rich data, it would be helpful to also think about the messages that your observation may bear for the idea of your research, your theoretical understanding of the research issue, the construct of the research question, the current design of the project, your data collection plan, and your provisional idea for data exploration. If you have already included a meaningful conception of flexibility in different aspects of the project, good observation can provide many hints that would help with modifying, improving, and enriching the qualitative inquiry project.

As a further aspect of the ideas generated through observation, there may be a theoretical notion or a discussion in the literature that you did not take seriously but your observation suggests further reading on that particular topic. Consider these suggestions and make notes of them during observation if possible. The observation process may also provide hints at slight gaps, shortcomings, problems, or simply different directions in constructing the research question and the design of the study. Moreover, when you sit in a classroom setting with the participants, you may come across many practical ideas that can facilitate the process of observation; practical ideas for more convenient implementation of your data collection ideas; and even ideas about other bodies of data to be added to the project. You can make a quick list of these ideas for later consideration.

Issues in Observation

There are a few practical concerns that you need to consider during the process of your observation and in putting the above ideas into the practice of collecting contextualized qualitative data: the positioning of observers in the context of observation and their balanced position between an intruding outsider and a submerged insider; the question of audio-visual recording and the related challenges; note-taking and writing fieldnotes; writing reflective notes called memos; and the embeddedness of other types of data in the process of contextual participation, membership, and observational data collection. The following is a discussion of these concerns.

Observer's Paradox

An important consideration in planning for participation and observation as part of the designing of qualitative research and also during the observation process is the positioning of the observer in the context of observation (Angrosino & de Perez,

2003). Observing and understanding any phenomenon requires an extent of distance so that you can see it as intact as possible in as unobtrusive a manner as possible. Outsider researchers need to keep themselves out of the way of the participants in their normal actions and interactions. They should avoid distracting the participants and disturbing the normal trends of affairs in the context of their study. Otherwise, what they observe is not the real context and what they record is not the normal involvement going on in the absence of an observer. Recording equipment, note-taking, researchers' searching gaze, and the very physical presence of on observer can alter the natural processes in the context, mainly by making the participants *act* differently by saying and doing things other than the usual ones.

On the other hand, the essence of qualitative inquiry requires in-depth under-standing of the context and seeing the issue under investigation from the point of view of research participants. This requirement necessitates observers to be posi-tioned within the context as a member next to the participants so that they can see through the participants' eyes. Moreover, for extensive involvement, observers should either be real members of that setting who observe their own involvements—like teachers observing their own classes as researchers—or they should become so close to the participants that they are viewed as part of the context.

Therefore, the observer's standpoint takes shape between two opposing posi-tions: the distance that keeps the context intact and preserves the natural contextual flow of events but denies the opportunity to closely understand the context from the perspective of the participants, and the involvement which provides the chance of close scrutiny but may create all types of distractions, be rejected by the partici-pants, and provide unreal images of the contextual climate of the issue under study. Labov (1972) is known to have first raised this issue of 'observer's paradox' in sociolinguistics: "the aim of linguistic research in the community must be to find out how people talk when they are not being systematically observed; yet we can only obtain this data by systematic observation." (p. 209)

This paradox in observers' position is one of the most prominent spots in qualita-tive inquiry where the notion of balance should be considered. (See the section on Flexibility and Balance in Chap. 2.) Researcher-observers need to strike a balanced position on the continuum between two extremes: at one end, a total outsider's posi-tion, observing from a distance at the real context, but seeing very little and gaining little about the insider's perspective, and at the other end, a position within the set-ting with the possibility of a close look at people and practices, but also with the possibility of disturbing and distracting the natural state of affairs and observing a fake flow of events.

There have been discussions of various ways of approximating a balanced posi-tion, and different points have been spotted on the continuum. True (full) partici-pant, play participant, participant observer, observer participant, complete observer, etc. have been suggested as some observer positions each with their own advantages and disadvantages (Flick, 2009). However, in the climate of qualitative inquiry, it is obvious that no fixed criteria and measures can be provided to help you find a bal-anced observer position. The broad advice to beginner observers is to carefully con-sider the research question you want to address and the type of data you want to

gather and then *find* your own observer position, which is probably somewhere between a participant observer and an observer participant. This may appear not to be a very helpful piece of advice on paper. You need to put it into the practice of actual observation so that the look and feel of being in the setting and interacting with the participants—along with a dose of trial and error—teaches you how to position yourself as an observer.

Recording

Your observation is not meant just to record things, like a video recording tool. You have concerns beyond a recorder's role; becoming involved in interpersonal relations, determining your position as an observer, monitoring and assessing your own data collection process, keeping an analytical look at the data you are collecting, and taking different types of notes. You observe as much as a participant can and you describe the events in your notes in as much a thick manner as possible, but these are obviously limited. There are much more details in the context than you can focus on during the time of observation. Therefore, audio-video—or at least audio-only—recording of what goes on in the classroom setting would be helpful for keeping track of the details of the events and referring back during the data analysis process (Merriam & Tisdell, 2016). Two points, however, need to be resolved beforehand: first, as part of the problem of access, gatekeepers should be convinced to allow recorders in, and second, the implications of recording equipment for the observer's paradox should be thought about.

Fieldnotes

If audio/video recording is not possible for any reason, then the load of recording all the data in the context is shared between your memory and traditional paper and pencil (or possibly a tablet nowadays) for taking notes known as *fieldnotes* (Beuving & de Vries, 2015). Describe as many details as possible about as many aspects of the research context as possible—people, acts, words, objects, relationships, etc. The entire process of observation as a data collection procedure is about this detailed *thick description* which shapes the major body of observation data. If note-taking at the time of observation is not possible for any reason, take your notes as soon as possible afterward. If you can take notes during observation, after-observation notes can still be helpful. Even if you do use recording equipment, they record the recordable only. In observing a setting like a language classroom, the unrecordable and unobservable should also be observed and recorded in fieldnotes.

Part of the task of note-taking can be done onsite during observation. If this is not possible or sufficient, write the additional notes as soon as possible afterward and preferably before much contemplation and before discussing them with others. In

writing your fieldnotes, be as illustrative as you can. Write in rich details and, as much as possible, provide background information as well as contextual rich descriptions of all acts, words, images, and the *climate* of the setting (Tracy, 2020). The 'avoid labeling' advice discussed earlier in this chapter is particularly relevant to this aspect of writing fieldnotes. Moreover, you need to develop your own style and shorthand rules that allow you to write quickly and informatively; decide about a way to organize the notes so that you know how to refer to them and find things in the notes that tend to become bulky; make your own system of codes for reminders, references, hints, etc. for later use; use drawings and visual symbols creatively; and if you use pencil and paper, be careful about your handwriting so that you can easily read the notes later on.

Memos

A considerable part of fieldnotes is devoted to the description of what goes on *in the setting* under observation; either what can be recorded by a video recorder or what goes on in the air which cannot be recorded audio-visually. However, during the participation and observation process, even more can be captured. Either within what we call fieldnotes or as a separate set of notes—which can be called memos— you should also record parts of what goes on *in the mind* of the observer. There are different types of notes that you may want to record in your memos. First, early analytic reflections and interpretations that might occur to you about events, acts, and interactions that you see during the observation. Although such a tendency for analysis should not dominate the observation process, recording such notes can pave the way for the later focused analysis of data.

Second, the observation process might provide all sorts of hints at theoretical issues that may need further reflection, contemplation, consultation, and reading. Recording the quick flashes of such ideas will allow you to later consider them more carefully and strengthen the theoretical side of your research. Third, observation as a central data collection procedure in your qualitative project can be an important source of ideas, questions, challenges, and hesitations about the overall plan, process, and procedures of data collection in your study. Your memos can include notes about elements that can be later used to make decisions about fine-tuning the very data collection process through observation; adding other sources and types of data and other procedures of data collection; and making other modifications in your data collection plan and deciding to make changes in the quantity and quality of the bodies of data that you include in the study. Finally, memos can also be shaped by emergent ideas about other theoretical and practical aspects of research and the details of your design that might occur to you during the time of observation and may need to be given further thought later.

Embedded Data

A final note about participation and observation is that the opportunity for deep contextual involvement and close engagement with research participants creates the possibility of gathering other types of qualitative data in language education research. Various data sources can be potentially embedded within the process of participation and observation. Observations probably include interactions with research participants. If consciously considered by the observer, such interactions can be viewed as informal interviews as a rich source of contextualized data reflecting the perspectives of participants. The rapport that observers can develop through such informal interviews can also pave the way for planning more formal interview sessions. Moreover, participating in a context like a classroom naturally includes different types of activities and materials that can be later focused on as important data source of their own. In language classroom activities, plenty of learner-produced materials such as writing samples are expected to be found; reflections and reactions to textbooks in their actual context of use are naturally part of the activities; and classroom involvements necessarily include multimodal dimensions. Such features can be considered by researchers as independent bodies of data. These other types of data are further discussed in the following chapters.

Questions

- *How can we conceptualize indwelling in researching broad sociocultural considerations such as language teaching policy, the politics of foreign language education, and macro-economic aspects of language learning?*

It is to be noted that in exploring such issues, participation and observation is not as straightforward a matter as classroom observation. The context of such an involvement is not a limited setting like a language classroom or an educational institution. The vastness of the context, the number of participants, and the complexity of various aspects of the society under consideration necessitate a kind of participation similar to traditional anthropological explorations of indigenous communities, which requires living with(in) the community for extended periods of time. Therefore, the context of study in examining such cultural, social, economic, and political issues in language education is the entirety of social life (Al-Issa & Mirhosseini, 2020). Indwelling in this sense means researchers' experiencing of life in the society of concern or, if they are already living in the society, seeing it from a researcher's eyes and in a constant attempt to (de)familiarize almost all aspects of life that can be potentially related to the research problem. This might in some cases involve considerations beyond the here and now, that is, the consideration of aspects of life not immediately observable in everyday activities but behind the scene and also some parts of the history of the society.

- *Can the notions of field, context, and setting be interchangeably used to mean the same notion or do they have different connotations that can be important in understanding participation and observation?*

Traditionally, field referred to the wider local area under observation which included environmental and physical aspects as well as the social and cultural atmosphere of the life of communities under observation. Researchers tended to reside in the field for a long time and to observe and record their observations, hence the term *field-note*. A *setting* can refer to a more specific physical location like a school or a classroom in which the phenomena of concern occur. Inside a setting, researchers may consider more specific *events*, that is, a relatively coherent set of involvements among the participants. Within an event, one may think of more specific parts that can be called *scenes*. However, beyond the complications and possible confusions that these terms and similar ones might create, what matters in observations can be referred to as *context*, that is, the complex, fuzzy, and holistic climate created by a web of interconnections among human participants and a variety of environmental elements. Context can be understood as the real-life situation of any phenomenon as it exists when no one is researching it. Understanding phenomena in such a situation is the ideal pursued in qualitative inquiry.

- *Is it possible for qualitative researchers to recruit observers, for example, in order to cover a larger number of settings on their behalf? Can observation be carried out by observers other than the main researcher?*

The bottom line in observation is for the observers to have a profound understanding of the research problem which is being addressed, an awareness of the theoretical basis of the issues related to the research, and intimate familiarity with different aspects of the context that they observe. Moreover, methodological knowledge and knowing what it means to observe and how observation should be done is also necessary. If these kinds of understandings and awareness are gained, the observer can be someone other than the one who designs the study and later analyzes the data. Therefore, the main researcher and the assistant observers should take care of how these preparations can be attained by the observer. Besides, they should also consider the importance of their mutual understandings and deliberately plan for how—in addition to fieldnotes and recordings—assistant observers can communicate their understandings of the overall climate of the context under observation to the main researcher who tackles the gathered data at the stage of analysis and interpretation.

- *Can researchers observe a setting in which they are involved themselves as a participant with a role like a classroom teacher?*

As discussed in Chap. 2, the context of one's own involvements—for example, a language classroom for language teachers and learners—can be an important source of research concerns and problems. Therefore, it is quite probable for language education researchers to explore their own teaching. Data collection, including observation, can focus on one's own activities. The caution in this regard for a

researcher who acts as both an observer and a research participant is about an added aspect of balance and flexibility that should be considered. Too much involvement in a participant role like teaching might deny the chance to see the depth of what is going on from a researcher's point of view. On the other hand, too much focus on the observer's role might carry them away and distort their role as a participant. The challenge for such a researcher is to find a balanced position so that the requirements of both roles are properly fulfilled.

- *Is there a procedure to determine a certain scope of observation for a particular study in terms of the number of settings, sessions, hours, etc. to observe?*

Either in the case of observation or for interviews and other types of qualitative data, one cannot specify predetermined amounts of data in terms of scope, types, categories, length of time, numbers, etc. Research goals, theoretical bases, research questions, the context, etc. should all come together in the design of the study and the researcher considers all of them—of course along with practicalities related to time, budget, and logistics—to decide about the scope and quantity of bodies of data to be gathered, including observation data. One issue in this regard is that considering all the theoretical, contextual, and practical aspects, researchers who can potentially collect a large amount of different types of data decide to stop further data collection at a certain point because they come to the understanding that the bulk of data already collected is enough to properly address the research question. Rather than prescribed beforehand, this decision about the sufficiency of data—sometimes called data saturation—is also to be made by the researcher based on the aforementioned considerations as the research process unfolds.

Further Reading

- **Angrosino, M. V., & de Perez, K. A. M. (2003). Rethinking observation: From method to context. In N. K. Denzin & Y. S. Lincoln (Eds.),** *Collecting and interpreting qualitative materials* **(2nd ed.) (pp. 107–154). London: Sage.**

The opening of the chapter is a strong emphasis on the prominent role of observation in social science research and a quick note about the question of 'naturalness' of the observed settings in 'inner-city sites'. Angrosino and de Perez, then touch upon the interrelated issues of observer position and the problem of objectivity. The main body of the chapter, then dwells on the distinction between the classis view of observation 'as method', which seeks minimal observer intervention and bias and the application of observation as a tool used by an outsider, and a re-conceptualized notion of observation 'as context'. The authors discuss principles of this latter approach that, in contrast to the traditional conception, focuses on issues of observers' membership and identity in the community of concern, and the contextualized understanding of the lived cultural experiences of the participants from their own perspectives. The chapter also addresses ethical issues in participant observation.

- **Murchinson, J. M. (2010).** *Ethnography essentials: Designing, conducting, and presenting your research*. **San Francisco, CA, USA: Jossey-Bass. (Chapter 6,** *Participant observation*)

In the context of the overall discussions in this book on ethnographic research, in this chapter Murchison addresses participant observation as an essential part of this kind of studies. He first questions the simplistic assumptions about observation as an easy task of just 'hanging out' and watching, before he turns to 'the apparent paradox' of participation and observation. In response to a skeptical position about the reasonable combination of participation and observation, it is argued that the two roles can be balanced. After addressing aspects of the problem of the length of time spent for observation and the issue of "depending on informants as teachers and guides" (p. 89), the chapter focuses on the actual process of observation by discussing considerations such as 'showing interest' and 'avoiding deception and misinformation' as well as paying specific attention to both 'repetitions' and 'variation' in what is observed.

- **Beuving, J., & de Vries, G. (2015).** *Doing qualitative research: The craft of naturalistic inquiry*. **Amsterdam: Amsterdam University Press. (Chapter 3,** *Looking at society*)

"Observations hold a special place in naturalistic inquiry. This follows directly from the ambition of naturalistic inquiry to minimally disturb, or frame, social life in a research situation, but instead to look at how it unfolds under ordinary conditions." (p. 65) Setting out from this view, Beuving and de Vries state one of their purposes in this chapter to be inviting their readers to see observation as the primary source of data in social research. They argue, however, that it is not an easy undertaking and needs careful consideration. The chapter presents a relatively extended account of some historical roots of observation in social science research and its theoretical bases and different conceptions in positivist as well as naturalist traditions of inquiry. The authors also discuss observer positions and some practical aspects of observation and recording fieldnotes as well as the possible consequences of observation for the societies that are observed.

- **Merriam, S. B., & Tisdell, E. J. (2016).** *Qualitative research: A guide to design and implementation* **(4th ed.). San Francisco, CA: Jossey-Bass. (Chapter 6,** *Being a careful observer*)

Merriam and Tisdell start their chapter on observation with quick notes on the ubiquitous presence of observing in everyday life; its importance in the research process; the naturalness of the context and providing firsthand information as distinctive features of observation; and critics' question about the highly subjective nature of observation and responses to these questions. The authors then pinpoint the six elements of 'setting', 'participants', 'activities', 'conversations', other 'subtle points', and researcher's 'own behavior', as the specific targets of observation in a research setting. Moreover, the stance of observers in the field is considered as positions of complete participant as a member of the community, participant acting as observer,

researcher acting as participant, and complete observer. Recording descriptions, quotations, and comments, in fieldnotes and also 'online observation' are other topics addressed in the rest of the chapter.

- **Taylor, S. J., Bogdan, R., & DeVault, M. L. (2016).** *Introduction to qualitative research methods: A guidebook and resource* **(4th ed.). Hoboken, NJ: Wiley. (Chapter 3,** *Participant observation***)**

This chapter on participant observation in Taylor, Bogdan, and DeVault's book highlights three broad concerns that shape the overall observation endeavor: interactions in the field, ways to gain data, and specific procedures and techniques. The preliminary concerns about participation and observation that the authors discuss are related to finding ways into the field; negotiating the role of the researchers within the setting that is to be observed; and establishing positive interpersonal relationships and rapport with research participants. After further elaboration on participation, informants, and relationships with them, the chapter focuses on what the authors call 'field tactics' specifically including acting naïve and researchers' situation where they can learn; developing rapport through 'doing favors'; not necessarily telling people about what they are doing; and using more 'aggressive' attempts at data collection in later stages of observation. Other points that the authors also discuss include recording fieldnotes, triangulation, and ethics.

- **Tracy, S. J. (2020).** *Qualitative research methods: Collecting evidence, crafting analysis, communicating impact* **(2nd ed.). Malden, MA, USA: Blackwell Publishing. (Chapter 6,** *Field roles, field notes, and field focus***)**

This chapter in Tracy's book addresses collecting data through participation and observation. It starts with a consideration of the researchers' role and standpoint and the type of their involvements in the field. She covers the positions of complete participant, play participant, focused participant observer, and complete observer. Then a major part of the chapter is devoted to the actual processes and procedures of recording data in the form of fieldnotes. Suggestions are provided as to the details of noticing and understandings events in the context under observation and efficient strategies and tricks of practically recording them. The author specifically presents these suggestions in a list of tips for writing fieldnotes. Noting that despite all preparations participant observation in the field "is fraught with ethical dilemmas and challenges that require you to play with the "rules" and improvise" (p. 150), the chapter turns to some ethical concerns surrounding observers' involvement in a research setting.

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Chapter 5
Collecting Interview Data

On the path of gathering contextually rooted bodies of evidence in qualitative language education research, as discussed in the previous chapter, recording first-hand streams of evidence through observation is a desirable procedure in many cases. However, not all language education research issues can be tackled based on the type of evidence gained in an observable setting like a language classroom. An important part of the required evidence for such research concerns tends to reside in people's minds and hearts. Moreover, even when the ideal bodies of data should be gathered through participation and observation, practical challenges may create obstacles. Therefore, talking to people and eliciting their perspectives and attitudes about issues under investigation has always been considered a potentially rich source of data that can provide valuable insights into the depth of many research questions (Roulston, 2019; Roulston & Choi, 2018). Such an elicited kind of data has been widely used in different fields of social sciences including language education research in various forms of 'interviews', serving a diversity of purposes that can be particularly important in gaining qualitative understandings. This chapter focuses on aspects of understanding and applying qualitative interviews in language education research.

Need for Interviews

As illustrated by the discussions and examples in the previous chapter, full immersion of the researcher in classroom contexts is perhaps the best way to access rich and multiple data bodies for certain types of research questions. However, there are at least three main reasons why observation is not the most frequent data source in qualitative studies in language education. The first force pushing researchers away from participation and observation is the issue of access. As mentioned in Chap. 4 (see the section on "Access and Gatekeepers"), it is usually difficult, and sometimes simply not possible, to secure permissions for participating in a community,

educational institution, or classroom as the context of a research project. This is a mundane practical issue but a very serious concern that reduces the number of successful attempts at relying on observation as a data collection procedure.

Moreover, ethnographic types of qualitative inquiry that heavily rely on participation in actual fields tend to be *expensive* projects in terms of time, effort, and money that should be spent. In academic areas like anthropology and sociology, true involvement in the field and the contextual understanding of the life-world of communities of concern tend to be realized in long-term projects of several months and even years. Naturally, huge amounts of institutional and/or personal commitment, logistics and facilities, and financial resources must be available for pursuing such research endeavors. In language education research, meaningful participation and observation of classroom contexts may need to be carried out in periods of at least several weeks and over tens of class sessions. Not surprisingly, this would be forbidding for many researchers and more so for beginners and student researchers, especially in the administrative climate of universities and academic institutions that are hesitant to trust and support qualitative research.

Therefore, even when the best body of data for your project can be gained through the observation of a classroom, you may decide to opt for alternative data sources. Apart from these practical obligations, a more technical reason may also exist for thinking about data sources other than classroom participation and observation. Consider the following research problem:

> *Graduate students in almost all fields of study in many countries around the world pass courses of English for Academic Purposes (EAP) with a focus on reading academic texts as well as writing and publishing in international venues. How specific groups of graduate students in a field of engineering or basic sciences extend their EAP classroom experience to the actual scene of writing and publishing in English is an ongoing research concern. How do they perceive such a process and what are the advantages, shortcomings, and challenges they experience on this path from the EAP course to the pages of an English language international academic journal?*

In addressing such a research question and similar questions on *how*s and *why*s, the central concern is what goes on in people's minds and hearts. Although a few sessions of observing learners and teachers doing their classroom activities or other types of language learning and teaching involvements might give some idea of their mentalities and attitudes, a more convenient way of data collection in addressing such research questions may be a procedure that provides access into their minds and hearts (Mann, 2011). *Interviews* are procedures through which researchers (interviewers) invite their research participants and informants to *express* their views. Interviews provide space for interview participants to reflect on and recount their perspectives, perceptions, and attitudes. Therefore, research interviews can be a vibrant source of qualitative data, providing rich insights into deeply contextualized and lived accounts of people in their life contexts—including their language teaching and learning life (Roulston, 2019).

In addition to providing the main data bodies in studies with certain types of research questions, in studies that observation provides primarily data, interviews can be embedded in observation. As an integral part of participation and observation, researchers *talk* to participants. Such interactions, which can be placed on a long continuum between scattered friendly chats and quite formal interactions with different people in the context under observation, can be seen as different forms of interview. Moreover, in many studies that rely on observations or other types of data (See the next chapter for an overview of other data types.), interviews can provide additional bodies of data that enrich the research process and outcomes through providing further in-depth understandings and supporting a triangulation process. (See Chap. 9 for a discussion of applying multiple data bodies and triangulation.)

Although interviews may be somewhat viewed as second-hand data rather than resulting from the researcher's first-hand involvements and experiences, they are potentially valuable data sources that are popular for at least three reasons. First, they are practically more convenient compared with a demanding procedure like classroom participation and observation. Second, through good interviews, the scope of the research setting can be extended far beyond the classroom setting to include the participant's language education life outside the classroom. Third, well-conducted interviews can tap a truly contextualized understanding of the context of the research issue, as interview participants provide their first-hand accounts of real full participation in all aspects of an otherwise complex and difficult-to-access context. Therefore, with all the possible challenges, interviews are perhaps the most widely used data collection procedure in qualitative studies, including those in the area of language education (De Fina & Perrino, 2011; Roulston, 2019; Talmy, 2010).

Interview Participants

The decision to include some kind of interview as a source of data in your project is usually made at an early stage when you think about designing your study. Depending on the direction of your research question and what you want to know, one aspect of the design should address the data collection procedures. When focusing on this aspect of the research design, you may decide that the required body of evidence (data) is best gained through *talking* with certain groups of participants. At that stage, you include interviews in the project and tentatively decide to rely on them as the only source of data or in combination with other data bodies. You may also roughly decide on who to approach and what kind of information and stories you expect to gather through interactions with participants.

In designing the actual process of going to people to listen to what they have to share, one of the first considerations to be addressed by the researcher is selecting the individuals and groups of people to approach and interview. The community or group of people whom you focus on in a study is selected based on the research question and context of study, but within this community you need to interview certain members. But "*Who* should be interviewed?" (Brinkmann, 2013, p. 57). The plan for approaching interview participants is an important part of the data collection part of the research design. The selection of participants and the specific

individuals or groups who are actually interviewed is not a haphazard activity but a deliberate process (Wengraf, 2001). Different approaches and varying labels have been suggested for such a process of deliberation (Brinkmann, 2013; Flick, 2007; Tracy, 2020). Traditionally, participant selection processes in positivist research are called *sampling* strategies. Although the process of selecting interview participants in qualitative research has also been called 'recruiting' (Josselson, 2013; Rapley, 2004) with obviously more qualitative flavor, I still continue to call them sampling approaches. However, I do hope that the qualitative nuances are preserved and that a review of these approaches can be insightful for beginner qualitative researchers in planning for the collection of interview data.

An important issue to be considered here is about the relevance of sampling approaches beyond interviews and the selection of interview participants. Sampling can be an issue in observation as well as collecting other types of data. If several options are available for observation, like many classes that can be accessed in several schools or several classes in the same school, you need to focus on selected classroom settings. Even in observing a specific setting like a classroom, you may decide to specifically focus on selected participants rather than the whole class. In collecting other types of data discussed in the next chapter, when options are available, sampling can be a concern in selecting certain settings, participants, time periods, pieces of materials, etc. Moreover, sampling is especially important in (multiple) case studies where the entire research process is about a selected number of people, incidents, or activities. In all these types of studies you need to select the cases of research deliberately, and your contemplation on an extended set of sampling approaches can be helpful in such deliberation.

Convenience Sampling

Your research community of concern can be language learners in a classroom, a local school, or a large university; language teachers in these contexts or in the wider context of a district or a town; or other smaller but more influential groups like policy makers, officials, and coursebook writers. One simple way to find your interview participants within such groups is to approach the members that are most conveniently accessible to you. For various reasons, members of your research community may not be all equally available for interview. You need to invite them, convince them, win their trust, fix mutually convenient timetables, and meet them in person or provide some communication facility. This is not equally possible for all members of the community. In the case of some participants, these practical prerequisites are resolved more easily. So, they can be more conveniently approached as your interviewees. This sampling approach is a really convenient way that comes especially handy for beginners and student researchers and in the case of less-explored topics, groups, and contexts where any member can initially be a rich source of data. However, in the case of research contexts and participants that have already been explored from different perspectives and are now being studied with a sophisticated and focused research question, the ones who are accessed most easily may not necessarily be the best participants to interview.

Random and Stratified Sampling

Apart from convenience, a way to find your interview participants in the groups of your concern is to randomly approach a number of people. The assumption in such random sampling is that each member of the group can equally represent the experiences of membership and that the possible discrepancies are balanced out when you interview several participants. This sounds like a proper way of approaching a group of participants, especially for researchers who still carry some sediment of positivist tendencies of objectivity and neutrality. However, it does not necessarily provide you with the best qualitative interview opportunities, simply because your selection is not based on knowing the participants in their context but, in fact, based on not knowing them. A somehow more sophisticated sampling approach is one in which you consider your research community not as a unified whole but comprising people with different characteristics and conditions. Then, within each one of these strata of the overall group members in the research context, you approach randomly selected interview participants. This kind of stratified sampling is based on knowing more specific characteristics of subgroups rather than bypassing what is known about the differences among them.

You observe a few elementary-level language classrooms and you also want to collect some interview data in addition to your observations. A convenient way of recruiting young interview participants is to approach the students who are accessed easily: children who are more talkative and outgoing, so that you can record a lot of talk rather than struggling to make them utter a sentence; children whose parents are more easily convinced to give you the permission and additional hour of talking to a researcher; and those who are available on particular days that you plan to allocate some extra time for interviewing them.

To opt for random sampling, you may decide to get a cumulative alphabetical list of the students in all of the classes and call on each fifth number in the lists. That would be totally random. This way, it is possible to end up with a group of mostly boys while the students are mostly girls. It is also possible to end up with most students from one class while the total list contains four classes. Therefore, absolute randomization is hardly desired in qualitative research. Even with a justification for random sampling, you may decide to call on every fifth number from two different lists; a list of boys and a list of girls.

Further along this line of stratified sampling, the early stratification can go beyond two separate lists for boys and girls. Depending on the details of your research question and what you already know about the students, you may refer to some or all of a number of distinct lists and pick up names from each one of them: girls under the age of eight in class number 1, girls above eight in class 1, boys under eight in class 1, boys above eight in class 1, and the same categories for the rest of the three classes.

Maximal Variation Sampling

Convenience, random, and stratified random sampling are not geared very much to the specific purposes of research and to researchers' understanding of the context under investigation, their general acquaintance with the community of concern, and their familiarity with the participants. Therefore, such sampling approaches are more in line with positivist research approaches that tend to apply structured interview procedures. (See the section on "Variants of Interviews" later in this chapter.) However, in qualitative studies, interview participants can be selected based on purposeful and targeted approaches. One way of such purposive sampling can be aimed at including the most diverse members of the community among the interviewed individuals. Rather than approaching random members or stratifying the target community of research into a few labeled strata, qualitative researchers can rely on their contextual knowledge and their familiarity with the research participants and consider the details of their differences and unique characteristics. In the case of large communities under exploration, researchers can at least notice the diverse patterns of people's characteristics. Based on such understandings, the purpose of your sampling approach can be to include as diverse a group of members in the interviews as possible. Maximal variation sampling can provide rich and detailed information in your data that can be the source of potentially profound contextual and qualitative understandings in addressing in the research question.

Theoretical Sampling

Rather than setting the purpose in your sampling to be accessing the most diverse perspectives form interview participants with maximally varying features, you can set your purpose in sampling based on some theoretical orientation or specific purpose reflected in your research question. Theoretical sampling can be shaped by relying on a specific theoretical position or framework that determines the optimum interview participants in our research. However, a more qualitative view of theoretical sampling is to rely on your profound understanding of the research question and to determine the specific type of data that can be applied in addressing the specific theoretical considerations or practical concerns embedded in your question. On this basis, and relying on the general familiarity with the context and participants, you can decide about the characteristics of certain people that can potentially provide the most suitable bodies of data to help with addressing your qualitative research question. Adhering to the emergent and evolving nature of qualitative inquiry, even with purposive theoretical sampling, you need to remain open to involving as diverse interview participants as possible and not to rigidly fix the circle of those who are interviewed.

Suppose you are assuming, based on some theoretical understanding, that those who already know a second language have particular advantages or face particular challenges in learning an additional foreign language. Alternatively, you may just want to initiate a heuristic and exploratory study on the possible challenges and opportunities in learning a new foreign language for those who already know a second language.

Obviously, in such cases, regardless of the size and diversity of the general community of language learners that you consider, the specific process of interview participant recruitment should seek learners whose experiences and perspectives allow you to address the particular theoretical issue of your concern. You need to look for research (interview) participants who already know a second language and are learning an additional one.

Snowball Sampling

A further version of purposive sampling is one in which the actual group of interview participants unfolds through the process of interviewing itself. You start with a small number or even a single person who is selected randomly, purposively, or based on convenience. Then depending on how the early interviews unfold, you decide about the next participant. The early interviews may hint at the later ones in at least two different ways. Based on what the first participants say or do not say—and know or do not know—you can decide who else in the context you should approach. This means that you need to somehow analyze the data that you gain in your early interviews. The outcome of the first interviews and how you can or cannot address your research question based on this outcome can devise new lines of purposive sampling that directs you toward the next interview participants. Moreover, the first participants can themselves be a source of ideas about other potential interviewees. Based on what they understand about your interview during the process of their interactions with you, they can suggest others to participate and can possibly create links and convince fellow members of their community to take part in your next interviews. These later interview participants can in turn introduce still others and the process continues until you have sufficient interview data.

Special Case Sampling

Purposive sampling is also realized in different other types of selecting specific participants based on researchers' understanding of their characteristics and their position in the research context and among other participants. In *typical case sampling*, you focus on selected participants that you know can provide you with

accounts of the most typical experiences of members of the research context. This can be a helpful substitute for random sampling with taking care of the same intentions in selecting the informants, but instead of ignoring contextual familiarity with participants, typical case sampling relies on knowing the context and the participants. Moreover, researchers may purposefully sample "rare, unique, odd, and deviant" data (Tracy, 2020, p. 85). To select interviewe participants that are especially related to the research question, you may also want to adopt an *atypical case sampling* approach (focusing on extreme, critical, or sensitive cases) and interview people with special characteristics or those with special experiences.

A discussion of sampling approaches even in much more details cannot provide a step-by-step trajectory of selecting interview participants in language education research. It is out of question to provide techniques of sampling and interview to be applied in interviewing people like very young learners, high-ranking educational administrators, and all the tens or hundreds of other possible types of research participants between these two extreme groups. However, for beginner researchers, reflecting on these sampling approaches can be a source of ideas and insights when planning their language education research projects. Like other aspects of qualitative research, reading more and more about such theoretical discussions, reading more and more qualitative research reports containing interviews, and experiencing the actual challenges of sampling and interviewing can help beginner qualitative interviewers gain better theoretical insight and practical ability in sampling and conducting qualitative interviews as a data collection approach in qualitative inquiry in language education.

Interview Questions

The heart of the interview is the content of your interactions with interview participants. Therefore, a crucial aspect of your planning for the interview is the type of issues that should be addressed, the specific questions that you decide to ask, and the sequencing of the interview questions (Josselson, 2013; Wang & Yan, 2012). In other words, a central concern of almost all researchers in thinking about interviews is what questions to ask in what order. Before we proceed to some response, there is an apparently obvious preliminary issue with which many of my graduate student qualitative researchers ironically appear to be grappling. *Your research question cannot function as your interview question*. You cannot approach the interview participants and simply ask your research question in the hope that their response would provide information, evidence, and stories to be recorded as the interview data and later applied in some kind of data analysis to address the research question.

A minute of contemplation would remind us that the process of conceptualizing and constructing a qualitative research question is a complex one and the outcome of such a process is a *loaded* question. (See the discussions in Chap. 2 on constructing and conceptualizing research questions.) On the one hand, our research question is loaded with theoretical notions and a background of relatively complicated technical knowledge of issues of linguistics, psychology, sociology, education, etc. On

the other hand, the research question is shaped by loads of professional and practical issues and our understandings of different aspects of complicated language education contexts. Moreover, research questions are normally stated in the lofty and relatively forbidding academic language and contain the jargon of various theoretical subareas of the discipline of applied linguistics and language education. Therefore, a second look at our research question from this perspective would convince us that it is by no means a good interview question posed to our *layperson* interview participants.

The irony is that we need responses that can help us address our research question but the question itself cannot be posed in the hope of receiving responses. Therefore, we need to move a distance from our research question to the interview questions. Assuming that we do understand the theoretical and contextual depth of the research question, and assuming that we know what is to be known by raising the research question, first we need to break it down into a few (perhaps three to five) themes. To do so, simply ask yourself what major issues you want to know about the research question. Then for each one of these themes, ask the same question and break them down into a few smaller points that you like to address. Depending on the complexity and depth of the research question, you may move ahead and break the resulting points to still smaller and less loaded points to address.

This process will provide you with around a dozen points that are probably more tangible and more easily understandable by your interview participant but overall carry the load of the research question that is to be addressed in the study. Obviously, the number of these minor off-springs of your research question can greatly vary depending on the number and complexity of your research question(s) and the characteristics of the interview participants. For example, the same research question would naturally be broken down differently for interviewing adult language learners and children. In this process, what you come up with are a set of points and issues to cover when talking with the interview participants and not necessarily a set of fixed *questions*. The actual question–answer interaction remains to emerge in action. It is quite possible to pose the issues and discuss them with the participants without necessarily asking questions as such.

In a study on the topic of reflective teaching and language teacher reflection, based on the research question, you plan to focus on teachers of a language teaching institute and to see how they understand and observe reflective practice in their professional life. The major theoretical notion in the research question is reflective teaching, which is too loaded and complex to be posed to interview participants as an interview question.

To move from the research question toward a number of specific interview questions (in fact, interview themes), one step is to think of a few major interim themes. In the case of this example study, one may think of reflective teaching as comprising say the three notions of (1) 'personal', (2) 'academic', and (3) 'collegial' dimensions. In other words, by asking the research question about

(continued)

reflective language teaching we mean to see if and how our research partici-pants attentively think about their own teaching; if and how they keep them-selves equipped and up to date about their teaching through theoretical and academic reading and involvement; and, if and how they engage and com-municate with their fellow teachers and discuss their language teaching con-cerns and problems.

However, these three interim themes cannot yet be easily communicated to the interview participants. The issues are too abstract and can be interpreted very differently with a potential of creating diverse understandings and mis-understandings. Therefore, each one of the triple interim themes should be further specified into more specific components so that the teachers partici-pating in the study can talk about, discuss, and exemplify them.

The 'personal' aspect of teacher reflection can be considered as compris-ing the three components of (1.1) preparing detailed personal lesson plans, (1.2) keeping notes about classroom events for later contemplation, and (1.3) occasionally asking for students' critical comments and suggestions about their teaching. The 'academic' aspect can be considered as comprising (2.1) reading specialized books and articles about language teaching, (2.2) taking part in related academic meetings, and (2.3) undertaking action research on their own teaching. The 'collegial' aspect can include (3.1) informal peer discussions of teaching concerns in recess time, (3.2) taking part in teachers' technical meetings, and (3.3) regularly discussing aspects of their teaching with senior colleagues and supervisors.

Now you have nine themes to discuss with the interview participants, and when you talk about them with the teachers, they can tell you about their own actual teaching-related involvements rather than distant conceptual theoriza-tions that can be difficult to capture or talk about. At the same time, by cover-ing these nine apparently simple issues, you are addressing the three main interim themes of your interview. Through this, you are, in fact, discussing your major research concern of language teacher reflection, and your inter-view data can probably provide rich insights into the research participants' reflective teaching perceptions and practices.

Each one of these nine interview themes can be put forward and discussed with the interview participants in a variety of ways and with any number of rounds of researcher turn-taking in the process of conversations with the interview participants, depending on how the interactions proceed.

The specific points that you decide to include in your interview questions can be put in a variety of orders. In planning for the interview, one should think about a logical way of sequencing the interview questions. You may want to move from specific to general or vice versa, less challenging to more challenging or vice versa, or a variety of other ways. I am not saying that there are fixed rules of sequencing interview questions to be mastered. However, consider the topic, the interview participant, and the context, and do think about a tentative sequence of your interview questions. After you come up with a number of specific notions to share with your interview participants and you think about a tentative sequence of putting these notions forward, a final step is to think about stating them and how you can pose them to the participants. The actual interactions take shape in the context around the pivotal concern of gaining meaningful data, but the overall direction to follow is to see who you are talking with, and to put your questions in a language that is tangible and less forbidding to them. The bottom line is to make sense to your interview participants (Josselson, 2013).

Yes, make sense. In doing this, you may need to basically question the idea of questioning in interviews. What I have called interview *questions* do not necessarily need to be interrogative sentences with question marks at the end. With all deliberations, elaborations, and sequencing, the actual statements on the part of a qualitative researcher-interviewer take shape in situ. Sometimes you may need to extensively explain, elaborate on, clarify, exemplify, and restate something that you want to ask—which you thought was a straightforward question. Sometimes, on the other hand, you may trigger the flow of more than enough data comprising information, stories, explanations, etc. with the slightest hint at what you wanted to ask—which you thought was difficult to communicate. The interview is (co-)constructed by the interviewer and interview participant in action. (See the section on "Co-construction of Interviews" at the end of this chapter and "The Constructed Nature of Data" in the next chapter.)

Conducting the Interview

Gatekeepers and problems with access are important concerns that can be the cause of reluctance of qualitative researchers for observing language classrooms. Therefore, issues of access can considerably push researchers toward data collection through interviews. However, concerns over access and permission do exist on the way of interviewers as well. Perhaps the first practical hurdle to jump over is winning the trust of the interview participants and possibly other people around them and convincing them to sit and talk with you. Afterward, a more complicated level of access when it comes to participants themselves is to access their minds and hearts and to receive their real and honest thoughts and feelings. I do not find it helpful here to advise on how to convince people to participate in an interview session but it might be helpful to see the following examples and think about the important and sensitive task of tackling people who are usually steadfast gatekeepers of the minds and hearts of themselves and even others.

Take the example of interviewing young language learners that I referred to earlier in this chapter. In order to find clues as to what goes on in the minds of eight-year-old beginner language learners enrolled in a foreign language institute, there are several 'layers' of gatekeepers to pass. The 'final' one is the little hearts and minds of the young interview participants themselves and the challenge of how to win their trust, remove their fears, and convince them to talk to you; how to meaningfully communicate your questions to them; how to persuade them to speak out and to keep them on track; and how to interpret what they say in their 'child language'.

Before you reach these 'final' challenges, however, there are at least three other gatekeepers. You should go through the challenge of convincing the administrators of the language school where the children study. Concurrently, either through the administrators or directly, the consent of the young learners' parents may also be needed. Moreover, if classroom experiences of the young learners are part of the interviews, the particular classroom teacher of the participants should also be talked to.

The 'layered' nature of the challenge of access can also be imagined—though in different configurations—if you decide to interview a relatively high-ranking official on policies and plans of language education at the local or national level. Tight schedules, strict secretaries, and suspicious advisors may be among the list of gates and gatekeepers to pass.

When you manage to start talking with the interview participants themselves, a more challenging stage of accessing them is related to developing rapport, being polite and respectful, and being meaningfully (in)formal in interacting with them (Schostak, 2006). Regarding the concern of formality, once more, you need to consider the notion of balance. (See the section on Flexibility and Balance in Chap. 2.) Between the two extremes of complete formality and full informality, almost always you need to find a balance point depending on the characteristics of the participants (age, gender, position, social status, psychological state, etc.), the topic of interview, the location, your own relationship with the participant, the mode of the interview, and many contextual considerations. Even more contextually variable is how you develop rapport and how you show politeness and respect (Prior, 2018). The major guide in the complex and variable climate of interviews in this regard is to see how you can prepare the ground for gaining insight into the true thinking and feeling of the participant at the same time that you are honest and you do not harm anyone (Josselson, 2013).

Apart from issues of access and the general climate of interview, in the actual process of interviews we need to observe most of the practical considerations that should be of concern in observation, as discussed in the previous chapter. Like in the case of observation, in the interview process, too, the guide is the research question. In deciding about relevance and irrelevance, focus of attention, directions of the interview process, and the meaningfulness of the general interview trend, the guide is to see if you are actually addressing the research question. Moreover, issues of

(de-)familiarization, avoiding labels, the analytical eye and constant search for meaning, avoiding distractions, assessing the interview process, and looking for ideas for different aspects of the project are all to be considered in conducting interviews. (For more detailed accounts of these concerns, see the seven tips in the section on How to Observe in Chap. 4.)

Moreover, as interviews rely on dialogues and discussions, in addition to preparing a well-developed set of interview themes discussed in the previous section, a few practical ideas should also be kept in mind. First, as mentioned earlier in this section, do not insist on posing only interrogative sentences and only once. Try to communicate your questions and be patient in explaining, repeating, and providing examples, and still be prepared for misunderstandings, confusions, distractions, and even frustrations. Second, we need to recognize the fact that people, see, think, and say things in different ways. So, give your interview participants enough maneuvering space to develop their own way of responding. This is especially important in narrative interviews where we want people to tell us their own stories. (See the section on "Narrative Interview" below.) Third, at the same time, do not be carried away by your interview participant's responses and stories. You should be patient enough to listen to initially irrelevant-sounding points and consider even slight possibilities of relevance that can appear later. However, at one point you might need to decide that what they say is irrelevant. Like any natural communication and interaction, you may need to interrupt, direct, and provide hints. You may need to be provocative, critical, and challenging. So, manage the interview process without sounding like an inspector. And, very importantly, summon all that you know about good listening and be an active listener (Talmage, 2012).

A significant consideration related to this dialogic and at the same time personally anchored nature of the content of interviews is the language in which it happens. You may have different options: a shared first language, a shared additional language, bilingual choices, a code-mixing possibility, etc. Using a shared mother tongue would be ideal but not always possible. Moreover, there is the issue of the language of publication that you envisage that makes things more complicated. This is another case that should be resolved by qualitative researcher's decision-making but it would be wise to consider Benson's (2013, p. 250) general advice in this regard. He observed "that participants speak more freely (and, therefore, provide more in-depth data) when they are able to express their experiences and ideas in the language they know best" and "that problems associated with the use of translated data are outweighed by the quality of the data itself".

In conducting interviews, the application of recording equipment is always an issue to consider. With a concern for later reviewing and data analysis, audio (and possibly also video) recording is obviously desirable in all types of interviews. Therefore, the general advice for qualitative researcher-interviewers in this regard is to record their interviews. However, like almost any other practical aspect of the research process, this broad piece of advice is to be observed in light of contextual considerations. The most important concern about recording interviews is that for some participants, the recorder may seem like a further intruder into their life context and they may not feel comfortable with it. Knowing that their voice is being recorded might influence or even basically alter what they say and how they say it.

There is no simple rule of dealing with such a dilemma but be aware of its possibility and see how you can resolve it in the specific condition of your interview. You may think of not informing the interview participants about the recording but that may raise ethical concerns of its own.

Variants of Interviews

Partly in the preliminary designing stage and partly in the actual process of data collection, one or more of the several possible interview types need to be determined. An important aspect of variation in interview formats is related to how structured the interview is. Although notions like structured, semi-structured, and unstructured have been discussed in this regard (Wengraf, 2001; Yin, 2011), actual qualitative interviewing is more straightforward. On the one hand, structured interviews in the form of rigid sets of mostly factual questions are not basically qualitative. On the other hand, unstructured interviews in the sense of talking to people with no plan and direction is practically not normally helpful. Therefore, qualitative data collection through interviewing usually happens based on a plan which is both purposeful and directed, and flexible and open. In pursuing such a semi-structured approach, the notion of balance should again be contextually defined and practically considered.

Apart from issues of formality and structure, in the following sections I present a sketch of some of the different types of qualitative interviews that can be envisioned in terms of content and interactions (Mann, 2016). We do bear in mind, though, that these are not rigid formats; that they are not to be viewed as one variant used at a time to the exclusion of others; and that real qualitative interviews may usually include elements of different interview types and can shift among them or shift emphasis or focus on one or more types.

In-Depth Interview

Qualitative interviews can take place in the form of talking with research participants in various settings—sometimes called *ethnographic interviewing*—and also in the form of more serious question-answer sessions (Murchinson, 2010). However, to explore the deep-residing ideas, attitudes, and perspectives of participants, as essential in qualitative research, extended and detailed discussions with interview participants can be more helpful in gaining insights into the depth of their positions and perspectives. Such in-depth interviewing is used to "elicit a vivid picture of the participant's perspective on the research topic… The researcher's interviewing techniques are motivated by the desire to learn everything the participant can share about the research topic." (Mack, Woodsong, Macqueen, Guest, & Namey, 2005, p. 29) The important features of in-depth interviews include talking with one participant at a time and focusing on individual positions and points of view; face-to-face conversation and considering the subtlety of emotions and contextual attitudes; the extended

time-length of interview sessions and possibly multiple interview sessions; and detailed discussions on specific aspects of the research issue with many exchanges of 'what do you mean', 'can you elaborate', 'can you give me examples', etc.

Narrative Interview

Narrative inquiry takes shape around research participants' extended accounts of their life experiences in the research context and their stories. (See Chap. 8 for an extended discussion in this regard.) Participants' narrative accounts of their experiences may be recorded in different types of data, but such narratives are perhaps best captured in narrative interviews. Such interviews relying on biographical information, life-stories, or oral histories are perhaps the most qualitative type of interviews in the sense of contextually rooted accounts of affairs from the perspective of the real members of the context of concern. "Narratives allow the researcher to approach the interviewee's experiential yet structured world in a comprehensive way." (Flick, 2009, p. 117) The narrative interviewer is more of an encouraging listener rather than a talkative questioner. The starting point of a narrative interview can be sharing a question or concern by the interviewer based on some contextual understanding of the issue under investigation, some familiarity with the interview participants, and a rough idea about their experiences. The opening of a narrative interview as well as the process of the conversations should be focused on creating a climate of compassion and trust, and inviting the participants to share their lived experiences in the form of anecdotes, memories, and even complaints and questions (Bathmaker & Harnett, 2010; Slembrouck, 2015).

Focus Group Interview

Interviewing does not necessarily mean talking with an individual research participant. In many cases extensive data can be gained from interviewing groups of people rather than individual research participants (Morgan & Hoffman, 2018; Roulston & Liljestrom, 2010; Yin, 2011). Group interviewing is widely discussed under the rubric of focus group interview, which includes discussions in the form of a web of interactions among a group of participants. The collective interview may provide data that the same participants may not necessarily provide if interviewed individually (Macnaghten & Myers, 2004). The number of participants can vary from a couple of participants up to a dozen people. "Perhaps the most unique characteristic of focus group research is the interactive discussion through which data are generated, which leads to a different type of data not accessible through individual interviews." (Hennink, 2014, p. 2, cited in Merriam & Tisdell, 2016, p. 114)

   Focus groups can be facilitative in at least two important ways. First, group discussions can remove some psychological barriers by reducing the prominence of the interviewer and by creating a sense of security and sharing among fellows rather

than information-giving to a stranger interviewer. Second, exchanging ideas among different people can provide more hints that are needed to trigger people's emotions, memories, and reflective thoughts (Galloway, 2020). This can reduce the load of providing hints and making people talk that is all on the shoulders of the interviewer in individual interviews. Focus group interview may raise challenges of its own, though, like moderating the group discussion and orienting the discussions toward meaningful exchange of ideas rather than distracted debates (Yin, 2011). Despite the practically demanding procedures of focus group interviewing, it can be a rich source of data reflecting participants' deep residing perceptions.

Written Interview

Interviews are associated with oral interactions but the purpose of interviews can, at least partly, be attained in the written mode as well. Asking people to write in response to your interview questions can facilitate the interview process. In written interviews there is no need to schedule interview sessions and to fix meeting places. More people can, therefore, be accessed with relatively little effort compared with face-to-face oral interviews. The written mode of responding to interview questions can also remove some psychological hurdles in expressing themselves for some participants. Moreover, written interviewing can resolve the issue of recording and transcription discussed later in this chapter. However, qualitative researchers should be aware of the problems of gaining true qualitative data through written interviews. Perhaps the most important limitation of such interviews is the limited communication between the interviewer and interviewees that increases the chance of misunderstandings and providing de-contextualized data. Moreover, in the case of extended narrative accounts, most people tend to be better oral story tellers than story writers. Therefore, written interviews are to be applied with a consideration of their limitations and with reduced expectations about the depth of qualitative data that they can provide.

Distance Interview

A feature of written interviews discussed in the previous section is that they can take place from a distance and do not necessarily require face-to face contacts. Such distance interviewing can facilitate the data collection process in terms of logistics and budget. But distance interviews can as well be done in the oral mode through telephone talks or online conversations. As expected from the miracles of online technology and the internet, online interviewing can take place in both oral and written modes and knows almost no borders and boundaries (James & Busher, 2012; Merriam & Tisdell, 2016). Distance interviewing in either written or oral mode and through the medium of paper and pencil, telephone, or the internet can practically facilitate the interview process and can help researchers access more people relatively easily. However, like the case of written interviews, qualitative

researchers need to consider the limitations of such interviews. The more the distance, the less the intimate interactions, and the less the depth of the contextual understandings that can be gained. Therefore, distance interviews should be employed as secondary data sources or, if employed as the only data source, they should be used with caution.

Issues in Interviewing

A few remaining considerations are there to be taken note of regardless of the exact features of your research question, interview questions, the interview type, context, and participants. Qualitative researchers should adhere to the qualitative nature of the research process and data collection in conducting interviews; they should beware of the possible pitfalls in naïve whole-hearted reliance on interview data, and they should appreciate the co-constructed nature of qualitative data gained through interviews. These concerns, along with the practical issue of interview data transcription, are touched upon in the following sections in this final part of the chapter.

Being Qualitative

The practical challenges of eliciting research participants' perspectives may sometimes overwhelm the interviewers, and this might threaten the qualitative depth of interviews. Qualitative researchers should always bear in mind that they are acting based on a certain epistemological position and methodological approach, and that interviewing is a process of collecting bodies of data that are congruent with their interpretive and constructivist standpoint. Gathering demographic pieces of information; asking yes/no types of questions; oral presentation of questionnaire-type items and expecting the selection of one of a number of choices by the respondents; directing the participants to provide short and definitive answers to factual questions; and asking a rigidly fixed set of questions based on algorithmic blueprints, can hardly provide qualitative data. Throughout the conceptual challenges and practical difficulties of interviewing, qualitative researchers need to constantly remind themselves that they aim to gain *qualitative* data and qualitative interview data means gathering the contextually situated perspectives of research participants that reflect their feeling, thought, and being.

People Don't Know

This is part of a note by a professor of mine when discussing issues in approaching people for interviews: *people don't know*. Throughout the discussion of the use of interview, participant selection, preparing questions, interview planning, and interview variants, an important assumption may be left unnoticed. Are we assuming

that the interview participants necessarily *know* the answers to our questions? Are we assuming that they are aware and conscious of the aspects of their contextual involvements and the events in their community? It is quite normal rather than exceptional to encounter interview participants who simply do not have the information that we expect them to provide; have not paid attention to events of our concern in which they have been apparently involved; have not thought about what we think they have seen and they should have an idea about; and have even developed no feeling or attitude toward people and practices in the settings around them, even if they have been part of the physical settings.

Qualitative interviewers' awareness of such a concern may be primarily important in selecting interview participants. In sampling, when you have options, opt for those who probably know, think, and feel more and more freely. Moreover, your consideration of these concerns reminds you that in the process of interview, some participants need substantial help in answering your questions; they may need hints in remembering, they may need help in thinking and analyzing, and they may need help even in deciding what they liked or disliked in an experience. One further related note is that, in collecting interview data, one should be cautious about the possibility of responses that are not necessarily based on understanding the context and do not necessarily reflect meaningful perspectives of an insider that can be taken as credible evidence in addressing research questions. In addition, qualitative researchers should understand their interview participants not only for interpreting what they have to say, but also for recognizing what they do not have to say and for keeping expectations from interviews at a logical level.

People Don't Tell

My professor's caution about what interview participants say was a two-part note: people don't know, and *they don't tell*. Even in talking about what interview participants do know and do feel, there are at least two cautions for the interviewer: it is possible that they cannot tell you what they want to say, and they may not want to share what they have in their hearts and minds. On the one hand, not all you have in mind can be expressed, not all what you feel can be put into words, and not all people are good at talking. On the other hand, people have their own agencies and can decide not to tell you what you may want to hear. This non-sharing attitude is more expected when interview participants are not truly convinced to take part in an interview. Even when they are participating willingly they may find different reasons for keeping some of their thoughts and feeling to themselves. More problematically, interview participants may tell you things other than their real perspectives. Telling lies is always possible and you cannot really argue that people must bring convincing reasons for doing so. Like the case of participants' not knowing, your consideration of participants' not telling invites you to be more careful in recruiting interview participants, be more sensitive during the interactions with them, and be logical in how much you expect and how you interpret interview data.

Co-construction of Interviews

Finally, it is important to note that, in line with the overall atmosphere of qualitative inquiry, qualitative interviewing does not mean the extraction of information from the minds of interview participants (Roulston, 2019). Interview data is shaped by interactions that involve the subjectivities of both interviewers and participants in a context (Fontana & Frey, 2003; Mcgregor & Fernandez, 2019). This may be particularly noticeable in the case of focus group interviews where the web of interactions and subjectivities is more complicated. As stated by Mann (2011, p. 9), "interview talk is inevitably a co-construction between the interviewer and interviewee." "The reflection that all interviews are co-constructed implies that the material produced by the interviewee is influenced by the context of the interview and the responses of the interviewer" (Josselson, 2013, p. 8). Therefore, it is important for the qualitative interviewer not to view interview participants as data producing machines but as people who have their extremely diverse concerns, including concerns about why and how they are being interviewed. The (co)constructed nature of data is an essential feature of all types of data that are explored in qualitative research, as more fundamentally, observation data, interviews, and the other data types discussed in the next chapter—even the apparently static ones like official documents—are all social constructions rather that objects. (See the section on "The Constructed Nature of Data" in the next chapter for further discussion.)

Questions

- *If the contextualized nature of data is an essential feature of qualitative inquiry, how should we conceptualize the notion of context in collecting interview data?*

The concept of context is about a host of personal, interpersonal, environmental, etc. dynamics that surround the phenomenon of concern and play significant roles in constructing understandings about it. The context of an interview can, therefore, be perceived to have at least two dimensions. The entire web of language education involvements of the interview participants is one aspect of the contextual situation of the interview. In the case of sociocultural research issues, this may be further extended to include the related aspects of the society and culture of the participant, as well. The other dimension of the context of interviews is the totality of the interactions constructed by the researcher-interviewer and interview participants in the actual conversations in the interview sessions. Understanding the interactions during the interview process as well as interpreting it in the process of analyzing data requires a consideration of these dimensions of the context of interviews.

- *Should we reveal our own identity, research purpose, interview goals, etc. to interview participants?*

Consider two points in this regard. First, we are not supposed to tell lies, mislead and confuse the participants, or harm them. So, if hiding one of these aspects of the study or interview entails a potential risk of such unethical consequences, the simple tip is to give them the information even if it reduces the chance of getting important interview data. This first consideration, though, should be put together with the second one: when there is no risk of misleading, confusing, or harming the participants, provide the minimum information that satisfies the participants. Depending on the participants' interest, curiosity, and possible insistence on knowing about what is going on, give them as much of the (*right*) information that removes their doubts and fears, and convinces them to truly participate in the interview. Providing more information than they demand is both a waste of time and energy, and a possible distractor that might reduce the depth and quality of the data that you gather through the interview.

- *If we cannot trust interviewees in terms of what they know and what they say, how can we basically rely on interview data as viable evidence?*

The caution about the interview participants' possible unawareness about the interview issue or their inability to express what they know and feel should not be interpreted as distrust or outright suspicion about them. The caution is not about the lack of trust in what people say but about the naïve reliance on interview data as taken-for-granted and undoubtable representations of reality. Like almost any other type of data—even including bodies of data collected based on the researcher's own observation—what people say in interviews should be understood as discursive constructions that might always be influenced by all sorts of participant characteristics, mentalities, and tendencies. Rather than dismissing the entire interview phenomenon as an impossibility, such an attitude on the part of the researcher-interviewer is expected to add to the depth of understandings gained through interviews and to strengthen the overall research findings.

- *Can repeated interviews or multiple interview sessions be planned to address complicated issues? Can interviewers other than the main researcher help in this regard?*

As mentioned in response to a question in the previous chapter, there is no way for the a priori prescription of a certain scope or certain quantities for data collection. Various theoretical, methodological, contextual, and practical dynamics of a project should be considered by researchers to enable them to decide about the data collection process. The number of interviews, the length of interview sessions, and interview repetition are part of such decisions (Baker & Edwards, 2012). Challenging and complex issues that are addressed in in-depth interviews and narrative interviews aimed at eliciting extended accounts of participants' perspectives naturally need extensive interview sessions or multiple sessions. Moreover, even when an interview theme is apparently exhausted, after preliminary analysis and reflections, the researcher may decide to discuss emerging points with the interview participants in repeated interview sessions.

As for assistant interviewers, again as mentioned in the Questions section of the previous chapter, the bottom line is the theoretical, methodological, and contextual

knowledge and understanding of the interviewer. So, interviewers other than the main researcher who designs the study and later analyzes the data can act as interviewers if they have the required awareness about different aspects of the study. How the researcher communicates these points to the assistant interviewers and how the interviewers communicate their contextual understandings of the interview involvement to the main researcher are also significant considerations in this regard.

- *Relying on internet technology, can interviews be conducted online?*

What matters in interviews is providing a space for the participants in the interview (including the researcher-interviewer) to conveniently communicate and co-construct the required understandings. Developing interpersonal relationships and establishing rapport, providing a climate of comfortable interaction, respecting peoples' privacy and taking care of the confidentiality of sensitive discussions, and considering other ethical issues are the main concerns in gathering interview data. The medium of interviews—oral, written, or online—is not a major problem. If online communication can facilitate the interview process without raising major methodological, ethical, or practical challenges, it can be obviously relied on as a medium of conducting interviews either as the only medium or in conjunction with other kinds of interviews and other kinds of data.

Further Reading

- **Wengraf, T. (2001).** *Qualitative research interviewing. Biographic narrative and semi-structured methods*. **London: Sage.**

This book discusses the theoretical as well as practical aspects of designing and conducting semi-structured as well as narrative interviews and also addresses interview data analysis. The first part of this book covers theoretical considerations about basic conceptualizations of interviews as well as various aspects of designing and structuring them. Part two addresses specific details of planning for different types of interviewing. Part three of this book discusses a number of concerns 'around the interview' including various ethical and legal problems, piloting the interview plans, different stages of preparations for interview meetings, and managing the sessions. The fourth part elaborates on aspects of working with interview results and data analysis. Part five is about the extension of interview data analysis, comparisons and categorizations, and making inferences and interpretations. Finally, part six deals with the theory and practice of writing about interview processes and findings.

- **Roulston, K. (2010).** *Reflective interviewing: A guide to theory and practice*. **London: Sage.**

Addressing beginner qualitative researchers as her main audience, Roulston examines different theoretical perspectives underlying interviews in qualitative research as well as the practical application of these approaches. Referring to various realizations of interviews beyond academia and in everyday life situations, she portrays an

image of the notion of interview in society today. Linking this to academic research, then, the author states that this book is aimed at assisting "researchers using interviews for the first time to consider the connections between theory and practice and to examine critically the use of interview data for research purposes" (p. 1). Through the discussion of various topics such as the theorization of qualitative interviews, designing interview research, the actual conducting of interviews, and analyzing interview data, the author covers three main themes: theoretical conceptions of research interview; the position of researchers in the interview; and, the methodological aspects of interviewing in qualitative inquiry.

- **Talmy, S. (2010). Qualitative interviews in applied linguistics: From research instrument to social practice. *Annual Review of Applied Linguistics, 30*(1), 128–148.**

Talmy's article focuses on qualitative interviews in the specific area of applied linguistic and language education. He argues that despite the increasing reliance on interview data as a means of examining the inner worlds of research participants, the theoretical landscape of the role of interviews remains under-explored in the field. The author presents an analysis of a bulk of studies which applied interviews in two major categories of 'ethnographic and case study research' and 'narrative/life-history research'. Through a discussion of issues of data status, power, voice, and data analysis, he proposes a distinction between a view of interview as a mere instrument of data collection and an understanding of interviewing as "as social practice, in which the research interview is explicitly conceptualized and analyzed as social action" (p. 129). On this basis, Talmy calls for "heightened reflexivity about the interview methods" (p. 143) in the field.

- **Talmy, S., & Richards, K. (2011). Theorizing qualitative research interviews in applied linguistics, *Applied Linguistics, 32*(1), 1–5. (Introduction to the special issue of *Applied Linguistics* on 'Qualitative Interviews in Applied Linguistics: Discursive Perspectives')**

In this introductory article, the special issue editors refer to the little attention paid to the theorization of interviews in applied linguistics and language education research compared with the relatively extensive discussion on the practical aspects of conducting interviews. Talmy and Richards introduce the special issue as part of the "the ongoing discussion about the status of interviews and interview data that continues across the social sciences by arguing on a general level for the need to theorize qualitative research interviews in applied linguistics" (p. 2). The contributions to the special issue are the following: a critical review of qualitative interviews (Mann, 2011); the interview as collaborative achievement (Talmy, 2011); co-constructing ambiguity and clarity in interviews (Miller, 2011); self-presentation in L2 interview talk (Prior, 2011); interview 'problems' as topics for analysis (Roulston, 2011); and, using micro-analysis in interviewer training (Richards, 2011).

- **Gubrium, J. F., Holstein, J. A., Marvasti, A. B., & McKinney, K. D. (Eds.). (2012). *The Sage handbook of interview research: The complexity of the craft* (2nd ed.). London: Sage.**

This second edition edited volume explores various theoretical, methodological, and procedural dimensions of developments in the evolving landscape of research interview. The editors explain that this edition of the book emphasizes the emerging 'dynamic,' 'interactional,' and 'reflexive' tendencies in theorizing interviews as complex practices. Moreover, they state that: "Taken together, the contributions to the Handbook encourage readers simultaneously to learn the frameworks and technologies of interviewing and to reflect on the epistemological foundations of the interview craft" (p. x). This book is organized in seven parts (each addressing various topics): interviewing in context (history, subjectivity, pedagogy), methods (in-depth interviewing, life story, autoethnography, focus groups), logistics (location, multiple interviews, sampling), self and other (interviewer self, constructing the respondent, reflexive interviewer), analytic strategies (grounded theory, interviews as discourse, using software), ethics (informed consent, confidentiality, institutional review board), and critical reflection (getting stories, interview as embodied communication, challenges for interviewers).

- **Brinkmann, S. (2013). *Qualitative interviewing*. Oxford: Oxford University Press.**

Rather than focusing on the process of interviewing, Brinkmann's book pays particular attention to understanding and reporting qualitative research that includes interviews. The exploration of the outcome of interview research is expected to also provide insights into interview processes. This book comprises five interrelated chapters. The introductory chapter touches upon the history of interviewing in qualitative inquiry as well as some philosophical considerations underlying different interview approaches. The second chapter focuses on designs of studies that employ interviews. Designing interview research is discussed in terms of the four phases of preparation, interviewing, analysis, and reporting. Chapter three turns to ways of thinking and writing about the research methodology of interview studies, and chapter four continues with the writing concern, shifting to writing about the findings of such research. Finally, the last chapter discusses critiques of qualitative interviewing and "different strategies for evaluating qualitative interview research" (p. 140).

- **Josselson, R. (2013). *Interviewing for qualitative inquiry: A relational approach*. New York: Guilford Press.**

This book focuses on in-depth interviewing in qualitative inquiry usually focusing on people's internal world of meanings and experiences or sociocultural phenomena. "In research projects that call for this form of interviewing as data collection, the interest is in people as actors rather than as witnesses. The intent is to understand how people construct or interpret their experiences" (p. viii). Assuming some basic familiarity with interview research, Josselson states that a focus on intersubjectivity and co-constructing experiences in the process of interviewing is the main goal of this book. The major themes addressed in this book include the following: the theoretical considerations in terms of the epistemological foundations of interviewing, the construction and interpretation of meanings, and the co-construction of interviews; planning and practically implementing successful interviews at different

stages and features of good and bad interviewing; and, establishing interview rela-
tionships, empathy in listening, and ethical considerations.

- **Mann, S. (2016).** *The research interview: Reflective practice and reflexivity in research processes*. **Houndmills, UK: Palgrave Macmillan.**

"The purpose of this book is to encourage more reflective thinking about qualitative
interviews. In attempting to do this, the book foregrounds the voices and experi-
ences of qualitative interviewers" (p. x). Therefore, the author focuses on the con-
ception of 'reflection' as the major theme addressed in this book with a particular
consideration of the field of applied linguistics and language education. After an
introductory chapter on 'reflective practice', Mann covers some general concerns
such as approaches to interviewing and then tackles the notion of context as a "noto-
riously elastic and a difficult concept to pin down" (p. 58). Two chapters then spe-
cifically explore various types and modes of interviews, and the interactions in the
actual process of research interviewing. Issues of interview co-construction, group
interviews, transcription, data analysis, and ethics are among the other topics
addressed in this book through ample examples and illustrations.

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Chapter 6
Diverse Sources of Qualitative Data

This is the third chapter of the book that deals with data collection. As seen in Chap. 4, participation and observation can be the source of perhaps the richest type of qualitative data rooted in the depth of research contexts. Moreover, Chap. 5 illustrated the diversity of the forms and functions of interviews as a ubiquitous data collection procedure in qualitative inquiry and the vast landscape of issues and considerations regarding interviewing. There are, however, many research questions that cannot be addressed based on data bodies gathered through observations and interviews. Especially when the scope of our research extends beyond classroom practices and the linguistic and cognitive processes of language teaching and learning, and enters the wider sociocultural context of language education, observation and interviewing either lose their capacity as a source of qualitative data or turn to secondary sources. Even when data collected through observations and interviews can be used as primary data collection procedures, there are several other data types that can be used to strengthen qualitative language education research.

Various Data Sources

Observation and interviewing are the most widely used qualitative data collection procedures in almost all fields of inquiry. Participation in the actual physical setting and the interpersonal atmosphere of a context like a foreign language classroom can probably give you the richest type of contextual data, and interviews can provide you with participants' rich accounts of their thoughts and feelings. However, these two are not the only ways of gathering data in qualitative studies. Depending on the research question, sometimes they may not be the best possible sources of data; sometimes they may need to be complemented by other bodies of data; sometimes their very application leads to the inclusion of other types of data; and sometimes they may even be completely irrelevant as a source of data in a qualitative research project. Other sources of data in qualitative inquiry are there, and they are important

(Flick, 2018). By some serious accounts, in qualitative research, anything can potentially be your data (Blommaert & Jie, 2010; Glaser, 2001, 2002).

As you will see in this chapter, addressing your qualitative research question may require one or more bodies of data that cannot be gained through observations and interviews. There are also studies that may require multiple data types including observation and interview data as well as other data types. Moreover, quite frequently, it happens that participation in a context or interviewing research participants uncovers other data sources and even necessitates collecting data through sources other than observation and interview. In the following sections, seven sources of data that can be examined in addressing qualitative research problems are briefly discussed and exemplified along with considering research questions that can or should be addressed by data obtained from one or more of these sources.

Learner Language

In addressing a research question like the example presented below, learners' under-construction language itself is an important kind of evidence that can bear messages as to various aspects of their ongoing challenges in shaping their new language. There are many aspects of the psychological, emotional, cultural, sociological, communicative, and formal and functional linguistic aspects of learners' written and spoken language at different stages of learning that the field of language education needs to explore in search of qualitative and in-depth understandings. Evidence about many issues in psycholinguistic processes related to foreign language learning maybe found in what language learners say and write in the language they are learning and in what they report about their understanding when they read or listen to something in the new language. To explore traces of sociocultural features, challenges, and shortcomings in learners' under-construction language, rich bodies of data can be collected in the form of learner language. Moreover, a research concern little explored qualitatively, is the structural, semantic, and pragmatic features of language learner's constantly changing new language that can best be investigated by focusing on learner language.

Learner language data can be gathered in two main ways: naturally occurring and elicited. Collecting and recording whatever learners write or say as part of their natural processes of learning in a language classroom or possibly in communication events outside the classroom is an ideal type of language data. With a bit of a challenge about authenticity—reminiscent of observer's paradox in observation—learner language can also be elicited in the form of diaries, compositions, speeches, and interviews of a sort (Faitaki & Murphy, 2020). An obvious part of learner language is what learners write and say in the language they are learning. However, exploring learner language can also be done through examining their understanding of the written and spoken form of the new language when they read and listen to the language they are learning. Therefore, learners' accounts of what they read and hear or their re-statement of what they understand can also be a part of learner language data.

In a study on integrating critical literacy and teaching English as a foreign language, Huang (2012) *highlighted the need for such an integration. The study focused on critical writing in English as a way for language learners to explore social issues in their own life at a local and global level. To explore this potential of critical foreign language literacy education, the study primarily relied on students' writing samples written in the form of research notes. These samples of learners' written language were to portray topics selected by themselves as well as their thoughts and reflections.*

In addition to applying learner language as data, Huang's study applied some of the other types of data discussed in this chapter: parts of the researcher's autobiographic notes; student's end-of-the-term reflection papers about their learning process; researcher/teacher's journal containing reflections about the process of teaching and research; and, notes from the consultation sessions with individual students. This research illustrates the application of a variety of data sources other than observations and interviews in qualitative language education research.

Coursebooks

The content of language teaching course books can act as an already-collected bulk of data ready to be examined at the data analysis stage of qualitative language studies, both as the sole data type and along with other types of data. Language education today—especially the teaching of English to speakers of other languages around the world—is notoriously anchored to coursebooks. Therefore, they can be the source of many research concerns in terms of the formal features the language taught in these books; the semantic and pragmatic aspects of their contents; the sequencing and structure of the presentation of teaching materials in them; the sociocultural and ideological orientations embedded in the coursebooks; and their visual and organizational features. In addressing such research issues, different types of data may be employed but obviously the most intimately relevant data to analyze is the very contents of the books that are directly related to coursebook-related research problems.

Moreover, research questions about many other aspects of classroom language teaching and learning as well as other research questions beyond the classroom can have a foot in coursebooks. In addressing research topics related to language classes such as teaching methodology and learner involvements, as well as in researching beyond-the-classroom topics like curriculum development, achievement and assessment, and language education policies and plans, coursebooks can be important bodies of data along with data bodies gathered through observations and interviews. Coursebooks from different contexts or countries can provide good bodies of data in comparative studies. They can also be relatively accessible data in studying the historical trends of language education if you find books published some time ago and the ones that appeared later. Coursebooks are perhaps one of the most easily collected types of data because the contents of the books are already compiled and you just need to get hold of a copy.

Apart from the investigation of coursebooks in relation to other issues like how they function in a classroom setting and within the complex web of inter-actions among teachers and learners, textbooks can sometimes be the sole source of data in language education studies. Here is the example of research projects on the sociocultural role of English language teaching in two different contexts, both of which relied on an extensive body of data comprising the contents of language teaching coursebooks.

Ke (2012) *examined the changing role of the English language in depicting the 'idealized model of society' through Taiwanese high school English books. The cultural contexts reflected in the textbooks and the cultural backgrounds of characters reflected in them were the central concerns in the study.* Babaii and Sheikhi (2018)*, in their critical discourse analysis, investigated the neo-liberal ideologies reflected and reproduced through popular English language teaching coursebooks in Iran.*

In both of these studies, a large corpus of textbooks was explored as the only body of research data. The data in Ke's research comprised 14 textbooks approved by the Taiwanese Ministry of Education and used in the educational system during the six national curriculum standard eras in a period of about half a century from 1952 to 2009. Babaii and Sheikhi selected the most popu-lar English language teaching coursebooks used in 64% of language insti-tutes in Thran, the capital and the largest city in Iran. Their data included four American and British coursebook series each comprising several books.

Diaries

In the previous chapter, written interview was introduced as a variant of interviews that can be employed in collecting qualitative data. Diaries are similar to written interviews in that they apply the written mode in collecting the reflections of research participants. However, unlike written interviews in which the interview participants write in response to rather specific questions and prompts posed by the researcher, diaries are open and extensive reflections of participants written over a relatively extended period of time (Rose, 2020). Good diaries can be a source of truly qualitative bodies of data that reflect a view of the perspectives and perceptions of research participants from within (Hyers, 2018; Yi, 2008). They can include fac-tual and descriptive data about events, people, and places, as well as attitudinal reactions, reflective comments, analyses, and evaluations from the point of view of the participants situated in the physical setting of research and the sociocultural and interpersonal context under study.

One type of diary data can be the diaries already written or being written by people not as participants in a study but for their own personal records. When these

people happen to become the participants in your research, you can ask them to provide you with some parts or all of their 'dear diary' entries as part of your data. More realistically, as part of the data in a project you may ask the participants to *keep* diaries. This can be especially helpful in data collection about classroom language teaching and learning processes. Teachers and learners can be asked to write diaries and you can provide them with instructions and guidelines on what and how to write the entries. Moreover, you can ask them to focus on providing more descriptive reports, or reflective comments and assessments, or both. Diaries can also be a site of recording extended and detailed narrative accounts of research participants' experiences. (See the section on Narrative Analysis in Chap. 8.) An added advantage of diaries as qualitative data is that the actual writing of data takes place in private safe zones without the pressure that can be felt in situations of being observed or interviewed. A caution in this regard, however, is about how much you can rely on diary data and participants' possible (in)ability or (un)willingness to pour out their inner thoughts and feelings in their diaries that are going to be read by a researcher. (See the two sections of "People Don't Know" and "People Don't Tell" in the previous chapter for a related discussion.)

In a study on Turkish pre-service English language teachers' perspectives on 'teacher talk', Asik and Gonen (2016) *investigated reflections of 23 pre-service teachers studying at two universities in Turkey. They specifically focused on a framework called Self Evaluation of Teacher Talk through examining different bodies of data, mainly including diaries. Research participants kept diaries reflecting their views toward the advantages and disadvantages of the particular framework. To guide their diary writing process, Asik and Gonen provided the participants with a few guiding questions that directed their attention to different aspects of their feeling and thinking about their own teaching to be reflected in the diaries. The researchers believed diaries promote reflection by the participating pre-service teachers and provided a rich source of research data that can provide insights into the teachers' awareness of their language use and teaching involvements.*

A different instance of using diaries as data in qualitative language education research is Gkonou's (2013) *research on the origins and solutions of foreign language classroom anxiety of a few Greek students. The study relied on 64 diaries (weekly entries written by eight participants over a period of eight weeks) as a source of data. The researchers provided training sessions about diary writing and asked the participants to record their reflections on a few focal points like aspects of the language classroom that created the most and least anxiety, the amount of their anxiety in dealing with different aspects of language, and how they tried to cope with their anxiety.*

Documents

There are a variety of documents that can be collected as data in qualitative language education research (Coffey, 2014; Prior, 2014a; Rapley & Rees, 2018). To envision the diversity of this type of data one needs to step out of the strict boundaries of language classrooms and micro-level teaching and learning research issues. Documents can function as qualitative data mostly in addressing macro level research questions that address the wider social, cultural, organizational, economic, and political aspects of language education. The types of such documents are too many to fully cover here as they may vary in detail in different contexts, but to provide ideas about documents as data, I mention some categories here: policy documents including language policies, educational policies, and cultural policies published by local or national officials; legislations on issues of culture and education that may bear contents related to issues of language teaching and learning; general educational plans and guidelines focusing on language education at the local or institutional level; curricula and syllabi at different levels that include sections related to language education; evaluations and reports of educational practices that include assessments of language teaching and learning at various levels; results of opinion polls containing sections related to language education; budgetary documents and reports with related information; and official test results like the results of national, local, or institutional exams which contain language sections.

Almost all of these document categories can be gathered from different institutional, local, or national contexts for comparative purposes. Moreover, almost all of them can be extracted from archives in a way to represent a long period of time in order to investigate the historical developments related to specific research issues. Like any other type of data, collecting documents as data has its own challenges including the problem of accessing certain categories of them that might be confidential or at least not for public use, and even if they are public, subjecting them to scrutiny might create sensitivities and disagreements by the producers of the documents or parts of their target society.

> Barrot (2019) *in his examination of the English language teaching curriculum as part of the Language Arts and Multi-literacies Curriculum in the Philippines, explored two publicly available official national documents as his sources of data. The first one was the latest version of the Language Arts and Multi-literacies Curriculum itself published by the Philippine's Department of Education. It provides frameworks and criteria for pedagogical involvements related to language teaching in the country. The other source of data in the study was a version of a document called 'P21 framework for 21st century learning'. He examined the content and coherence of the documents through policy text analysis and provided suggestions for the improvement of language education policies reflected in them and the implementation of these policies.*

Media Content

Beyond the bounds of language classrooms and with research questions that address the social context of language education rather than the limited cognitive and linguistic topics predominantly studied in the field, the content of media becomes a significant part of the social surrounding of language education (Mikos, 2018). Therefore, various types of the contents in any kind of mass media that, one way or another, reflect concerns related to language education, can potentially provide you with important data. Advertisements and promotional materials, news reports of various types, and related analyses and discussions are among the media materials that can be analyzed in relation to the cultural, social, economic, and political aspects of language education like language education policies, sociopolitics of language teaching and learning, and the ideological and political concerns surrounding the teaching of different languages (Hodgetts & Chamberlain, 2014; Oda, 2020). Moreover, language teaching/learning materials and instructions can be provided through different types of media. Such media contents can, therefore, provide data in exploring some practical aspects of language education. Such data can be reflected in a variety of traditional media like television, radio, magazines, and newspapers as well as the constantly emerging internet and social media.

Oda (2017) *explores English language teaching in Japan and examines the interconnections of language learner opinions, public perspectives, and policies in this regard. The study investigates the role of mass media in shaping public opinions about learning English. In addressing this concern, the researcher refers to different bodies of data including messages posted on Social Network Services like Twitter as well as advertisements in various media. The bulk of data in Oda's research also includes 175 websites related to teaching the English language to Japanese children. It is argued that native-speakerism is represented and reproduced through these media sources.*

Multimodal Materials

As distinct from numerical data in quantitative research, almost all types of data in qualitative research are known to be primarily *verbal* data in the form of talk and text (Flick, 2007). However, even in the major qualitative data collection procedures of observation and interviewing, in addition to words that you hear, images that you see may also shape important parts of your understandings. Therefore, images (either still or moving) and even sounds other than human talking (like music) can be part of qualitative data in social sciences (Bull, 2018; Eberle, 2018). In qualitative language education research, multimodal data bodies—centrally

including visual data (Pink, 2014) —are shaped mainly by specific focus on multi-modality in other types of data. During observation, the nonverbal aspects of what goes on in a setting like a language classroom are crucial to the contextual under-standing of events. Video recording and/or taking pictures can capture this nonver-bal aspect of the observation context in the form of multimodal data (Banks, 2014; Mikos, 2014). Even in interviews, regardless of the possibility of video recording or photographing the interview participants, gestures are important multimodal aspects of interpreting your data. In virtually all other types of qualitative data discussed in this chapter, films and/or pictures can be ancillary parts, if not independent data bodies. In coursebooks, documents, and media, multimodality is an indispensable aspect of qualitative data.

> *Bulks of multimodal data were used by* Mohammadi, Shirvan, and Akbari (2019) *in a project that investigated the process of developing language teaching activities by a group of six graduate students of Teaching English as a Foreign Language. The study, more specifically, addressed the nature of the literacy practices that these student-teachers applied in the process of devel-oping classroom activities for foreign language teaching. Moreover, the research focused on different aspects of conveying meanings in the web of communication shaped during the interactions of these student-teachers.*
>
> *In addition to observation and interviewing, data collection was specifi-cally carried out through video recording and photographing the interactions of the six participants during the process of developing language teaching activities. The recorded involvements included their discussions as well as their use of digital equipment like laptops and cell phones. These data bodies were analyzed by the application of a systemic functional multimodal dis-course analysis approach focusing on semiotic elements such as gaze and gestures.*

Digitized Content

Almost all other types of data may be somehow put into a digital format. Therefore, digital data may not necessarily count as a distinct category of qualitative data but a different mode. However, digital technology has been so widely applied in all aspects of life that even the most typical types of qualitative data can gain distinct characteristics when brought into the digital mode. Therefore, it is important to consider that the audio and video records of observation as well as fieldnotes and memos; different types of interviews either recorded or transcribed; and different data bodies of learner language, books, documents, and diaries captured in various textual or multimodal ways, can all be converted into the digital mode. However,

there are other forms of data that are basically created in the digital format. The contents of many documents, coursebooks, and multimodal language teaching and learning materials are created on digital platforms and distributed as different types of disks and in different software environments.

These are all digital sources which can be sought as a distinct category of qualitative data (Flick, 2018). In addition to such data bodies, there are other sources of data that cannot be imagined outside the realm of digital technology, computer software, and the internet. Contents on internet websites, online forums, social media, and computer games related to language education are necessarily digital data that can be applied in qualitative language education research (Marotzki, Holze, & Verstandig, 2014). Increasingly, research problems can emerge to specifically raise from language education in the context of spaces like the internet, online communication, and social media. The host of language education subarea of practice and research known as Computer Assisted Language Learning (CALL) takes shape around the necessarily digital mode of teaching, learning, and research. Therefore, research in this domain, which can particularly focus on qualitative approaches (Levy & Moore, 2018), naturally relies on digital qualitative data.

Issues in Data Collection

In this final part of the chapter, I raise a number of additional concerns about some aspects of qualitative data collection. Apart from a very quick sketch of still more possible sources of data, these concerns include the issue of collecting data by people other than the researcher or using already compiled sets of data; the conceptualization of context with regard to data sources like documents and diaries; the application and integration of multiple types of data; and the socially constructed nature of data which is distinct from a view of data as static facts and figures. These concerns are not only about the data sources discussed in this chapter but about observation and interview as well.

Further Data Sources

In addition to the several different sources of qualitative data discussed so far, there are other ways of collecting data that do not provide qualitative data as such and may not act as the only source of data in a qualitative language education project but might be used to produce ancillary evidence. Researchers in the field of language education may be advised not to involve themselves in the challenge of dealing with such data in their early qualitative research attempts, but a rough awareness of these marginal sources may be helpful in broadening their view of qualitative data

collection. The first category of such data comprises language corpora as huge archives of spoken or written language in the form of general corpora (like collections of newspaper texts) or on specific topics (like academic language). These archives are used in corpus analysis, which is predominantly quantitative but can be carried out qualitatively, too (Hasko, 2013).

Questionnaires can be a further considerable but tricky source of data. Beginner qualitative researcher should know that standardized questionnaires do not yield qualitative data. Yet, some form of non-standard questionnaires can provide data that may be applied as secondary data and with caution in interpretation. Moreover, descriptive statistical information and census-like data—for example about the number of learners, teachers, resources in different contexts—may also be used as marginal data in qualitative language education research. Finally, sometimes your research question may be about the overall outcome of research already conducted over a period of time (Timulak, 2014). Your research question, for example, may be about what the field of language education has learned during the past three decades about specific aspects of language teaching and learning (Genesee, Lindholm-Leary, Saunders, & Christian, 2006). Therefore, the data in your study comprises a bulk of previously published research reports. Collections of published research articles or books can themselves be part of qualitative data subjected to meta-analytic or meta-synthetic studies (Finfgeld-Connett, 2018; In'nami, Koizumi, & Tomita, 2020).

Data Collection by Others

Corpora are examples of data collected by people other than researchers themselves. In relying on such data, developing the research question and deigning the study as well as the later process of data analysis are carried out by the main researchers but, rather than gathering data, they merely select bulks of data that can be used in addressing their research question (Akerstrom, Jacobsson, & Wasterfors, 2014). Similarly, data types other than corpora may also be collected by other people. When the scope of data collection is too vast to be managed by the main researcher(s); when people other than the main researcher(s) can more conveniently access difficult-to-access settings, people, or sources; or in the case of other practical considerations, you may benefit from the help of other people in observing, interviewing, or collecting other types of data (Benson, 2013). In doing so, familiarizing the actual data collectors with the theoretical and contextual climate of the study is crucial. Moreover, the main researcher should analyze the data with further caution because of their absence in the data collection process and should possibly invite the data collectors into the analysis process as well in order to bring their experience of contextual involvement into the process of data analysis.

Data Contexts

As partially noted in the Questions sections of previous chapters, the contextual essence of qualitative inquiry in general, and qualitative data in particular, should be understood beyond physical settings. Observations, interviews, and all the rest of the data types discussed in this chapter are to be explored in complex contexts but for some of them the setting may play little role in shaping the context, and for some, the immediate physical setting might be almost irrelevant. Therefore, the context of these various data bodies should be perceived by an extension of their temporal, geographical, personal, and interpersonal situatedness. In the case of some data types like documents, an extended period of time and some historical trends may need to be considered as important aspects of the context of data. For other types of data, like coursebooks and some media materials, the location should be considered with care as it might be sometimes irrelevant or misleading. Yet other types of data, like learner language and diaries, may best be understood in terms of personal mentalities and life experiences as well as interpersonal relationships rather than a specific physical setting. Overall, the context of data should be basically viewed as the conceptual climate and all the dynamics that truly contribute to the construction, functioning, and understanding of data (van Dijk, 2009).

Using Multiple Data Types

The use of a single body of data in a research project may be viewed as exceptional rather than normal in qualitative studies. Most qualitative studies—including those in the area of language education—use at least two and sometimes several different types of data. Different data sets do not usually play equal roles in a single study. They can be different in terms of the researchers' focus on them, the quantity and volume of the gathered data, and the quality and importance of their role in addressing the research question. Nevertheless, the very collection of different data sets can create the possibility of more prolonged and in-depth involvement in the context of research and more intimate interaction with research participants. Moreover, and perhaps most importantly, the use of multiple types of data means the examination of the research issue from different perspectives. (See the section on Triangulation in Chap. 9 for a related discussion.) However, beginner qualitative researchers need to be aware of the fact that relying on different data sources raises the challenge of integrating them meaningfully and analyzing them as coherent sets of evidence rather than scattered pieces of information.

The Constructed Nature of Data

This final section of the three data collection chapters in this book is a note on an overarching feature that should essentially be part of researchers' understanding of the nature of qualitative data. Based on a constructivist and interpretive epistemological position, the bulks of evidence that are collected as data and are explored in addressing research questions, are not rigid and static pieces of facts collected to represent the single and absolute reality out there. This might be the case within a positivist epistemology but not in qualitative inquiry that relies on a fundamentally different stance. In line with social constructivist epistemological positions, the overall processes of qualitative inquiry, specifically including qualitative data collection, are based on the idea that the examined issues and conceptions that are shaped about them are all socially constructed (Angrosino & de Perez, 2003). This is not a relativist position of denying external realities and evaluating all understandings as equal, but human understandings are subjectively constructed, be it the perceptions of research participants or researchers (Flick, 2004). From such a perspective, not only verbal data, but even a "photograph is socially constructed in the sense that the social positions of the photographer and the subject come into play when a photograph is made" (Harper, 2004, p. 233). Therefore, data bodies cannot be taken for granted as factual evidence and do need to go through challenging processes of examining and exploration aimed at sense making out of them, that is, data analysis.

Questions

- *In the case of some kinds of data like historical documents or old media contents, there may be little contextual information even in the sense of the wider sociocultural atmosphere. How can we contextualize this kind of data?*

Based on a conception of context as comprising the totality of the various dynamics that contribute to the understanding of a phenomenon, in the case of such materials, aspects of their very historical period make the main part of their context. The producers of the documents and materials, their intended audience, the purpose of the materials, and social situations of the time can all be considered as their context. Moreover, their relevance to the present time is perhaps the most important issue to consider. The information and understandings available about such apparently de-contextualized bodies of data can be considered within the context of the current research problem and its importance in today's society. This may be called a kind of re-contextualization of the data in the contemporary context of the research topic under investigation.

- *Questionnaires appear to be frequently used in language education research. What is the problem with their application as sources of qualitative data?*

Standardized questionnaires are developed based on epistemological and methodological principles associated with experimental and quantitative research approaches. Such questionnaires are usually validated and checked for measures of

reliability, and the data collected through them are usually analyzed through statistical tests. Concepts like variable, measurability, objectivity, and reliability, which are founded on positivist epistemological views, do exist in the methodological baggage supporting standard questionnaires. That is why such data collection instruments are not basically meant to provide in-depth and contextually-situated data. In administering questionnaires, although the participants' perspectives are apparently asked for, these perspectives can be expressed only within the confinements of already fixed responses. Nuanced details of these perspectives remain unaddressed. Therefore, the contextual situatedness of data and accounting for the depth of participants' perspectives as essential characteristics of qualitative data collection are mainly absent in questionnaire research. However, some versions of non-standardized questionnaires which actually act as a simple written interview might be used in qualitative studies. The information gathered through such questionnaires should be interpreted with caution and preferably as a secondary body of evidence in conjunction with in-depth qualitative data.

- *Numbers are the substance of quantitative research. How can numerical descriptive statistical information be used in qualitative studies?*

The essence of what is referred to as quantitative research is 'probability testing', based on checking a specific set of numerical measures against an ideal normal distribution of the characteristics of an imaginary population reflected in the well-known bell-shaped curve. Measures obtained from samples are tested against imagined populations through various statistical procedures to reveal different types of purported cause–effect links or relationships among the so-called variables. Obviously, not all types of numerical information can satisfy the assumptions of such probability testing procedures. Counting and frequency measures may be used to provide some general understanding about different aspects of phenomena in a context, without reliance on so-called inferential statistics. Therefore, frequency counts—although not considered qualitative bodies of data that independently provide deep contextual understandings—can provide broad rudimentary information about some aspects of the context and can shape a part of more profound understandings in qualitative inquiry. In the same way that not all sets of verbal information can count as contextual qualitative data, not all cases of using numbers means quantitative researching.

- *The researcher is not present in the process of data collection when already collected bodies of data are employed. Can we ignore the researcher's subjectivity as a significant part of qualitative inquiry when we apply data collected by people other than the researcher?*

As in the case of observations and interviews, for collecting other types of data, too, the major concern is the role of theoretical, methodological, and contextual awareness in the process of data collection. Within the physical and discursive context of research, these kinds of awareness play crucial roles in understanding the context and gathering rich evidence to be examined as data in addressing the research question. The person who actually carries out the practical task of gathering and

recording data can be anyone with the required understanding, awareness, and involvement. If people other than the main researcher who designs the study and later analyzes the data are responsible for data collection, the communication of research purposes, theoretical bases, methodology, etc. to them, as well as the communication of their view of the data collection process back to the main researcher are important. In the case of already-existing bodies of data, like historical documents or archived media contents, the researchers' subjectivity is realized in their understanding of, and position toward the context of the production and application of those sources and their historical as well as current social functioning.

- *Is the notion of the constructed nature of data based on 'relativism' and the claim that there is no fixed reality out there to be understood?*

Constructivism as an epistemological standpoint is by no means synonymous with relativism. The argument based on a social constructivist standpoint is that human perceptions and practices are socially situated and constructed within a complex web of social dynamics. On this basis, the possibility of coming to rigid objective understandings of human involvements bereft of any subjectivity is questioned. This does not imply that subjectivities are not understandable and, therefore, phenomena in the world cannot be understood. Moreover, a constructivist position does not mean that all subjectivities are equally valuable and that there is no good and bad or better and worse in the subjective perspectives and perceptions that people can adopt. Understandings are socially situated and almost always subjectively mediated but subjectivities are discussable, construable, and assessable. Therefore, in qualitative inquiry, better and worse, relevant and irrelevant, meaningful and meaningless, and even right and wrong understandings can be distinguished and, in many cases, agreed upon.

- *To what extent can we rely on multiple data sources in a single project? What are the advantages and limitations of using different types of data together?*

Not unlike other aspects qualitative research designing, no a priori prescription can be provided about how many types of data to collect in a project. It is generally perceived that the investigation of the research issue based on multiple data sources is better than relying on a single body of data. Basically, gathering more diverse bodies of evidence from different sources in the form of different types of data can potentially help the researcher gain more comprehensive understandings through the exploration of the issue under investigation from multiple perspectives. (See the section on Triangulation in Chap. 9.) Therefore, the contribution of the data triangulation process to the quality and strength of research is the major advantage of gathering and analyzing multiple data types in a study. This can imply that the more types of data you apply, the better your research.

However, this assumption has its limits. Too many types of data from too many sources that provide huge bodies of evidence beyond the saturation level may actually provide redundant bulks of information that take a lot of effort to analyze but provide little further understanding. Such a data collection situation is methodologically unhelpful and is practically a waste of time and effort. Moreover, an important

disadvantage in such a condition can be the difficulty of putting all of the different bodies of data together as a coherent whole. In addition to the practical difficulty of analyzing diverse bodies of data, interpreting too many different data types is difficult if they suggest even slightly different nuanced interpretations.

Further Reading

- **Flick, U. (2009). *An introduction to qualitative research* (4th ed.). London: Sage. (Part 5, *Observation and mediated data*)**

In this fifth part of his book, Flick includes three chapters about visual data, documents, and online data. In the chapter on 'Visual data: Photography, film, and video', the author elaborates on the application of photographs, films, and videos as 'forms and sources' of data in qualitative research. Referring to the long history of photography in ethnographic research, he discusses the application of cameras as data collection instruments and the use of photos in interviews and also discusses the application and analysis of films and videos. The chapter on 'Using documents as data', deals with conceptions of the term document and the problem of selecting such data types and shaping a corpus as well as some issues in analyzing them. In the chapter on 'Qualitative online research', Fick considers the internet as the subject of research itself, before a discussion of 'using the internet' as a medium in qualitative research.

- **Yin, R. (2011). *Doing qualitative research from start to finish*. New York: Guilford Press. (Chapter 6. Data Collection Methods: 6E, *Collecting and examining*)**

In this section of the book, various types of 'materials' are included among the types of data that can be explored in qualitative inquiry. Objects, documents, and artifacts related to any study are said to be among the sources of evidence about the research issue. Such bodies of data can be collected during fieldwork or from archives, libraries, and data bases. The collected materials can produce further visual and verbal data and can be the source of understandings about underlying unobservable things. Other sources of data that the author introduces are 'surfing' and 'googling' which can provide important web-based data about most research topics nowadays. Moreover, Yin views *feelings* as a category of data next to observations, interviews, and materials. "The data here are your feelings. You should write these feelings down as carefully as possible, noting when and where they occurred." (p. 151)

- **Leavy, P. (Ed.). (2014). *The Oxford handbook of qualitative research*. Oxford: Oxford University Press. (Part Four, *Text, arts-based, and internet methods*)**

This part of Leavy's edited book includes four chapters dealing with different research methods which rely on data sources such as documents, pictures, and the internet. The chapter by Prior (2014b) is about 'Content analysis' and highlights the exploration of documents as an important data category. The chapter by Holm (2014) not only considers images as a form of data but steps beyond data and

discusses 'Photography as a research method'. This chapter also addresses different approaches to the analysis of Photographs. Chilton and Leavy's chapter (2014) is about "Arts-based research practice" in social sciences and includes discussions of visual data and films among other data types that can be explored artistically. The final chapter in this part of the book is on 'Internet-mediated research' and by Hewson (2014) who concentrates on the internet, mainly as a medium, but also addresses the nature of different types of mediated data in such research.

- **Beuving, J., & de Vries, G. (2015).** *Doing qualitative research: The craft of naturalistic inquiry*. **Amsterdam: Amsterdam University Press. (Chapter 5,** *Reading society: Texts, images, things*)

Various types of evidence that can be explored as data in qualitative social research are mentioned by Beuving and de Vries, including documents, paintings, photos, films, and even dances. "The aim of this chapter is to sensitize you to the fruitfulness of studying human artefacts in general as important sources of information in naturalistic inquiry." (p. 114) Images, including drawings, paintings, maps, photographs, and films are one of the major categories of qualitative data discussed by the authors. They also consider various types of objects as well as buildings as another category of data that can be applied in researcher processes 'to tell about society'. A specific type of data highlighted in this chapter is documents that (un)intentionally reveal or hide the ego of their producers. They are called 'ego-documents' and can include diaries, personal notebooks, and mobile phone memories.

- **Merriam, S. B., & Tisdell, E. J. (2016).** *Qualitative research: A guide to design and implementation* **(4th ed.). San Francisco, CA: Jossey-Bass. (Chapter 7,** *Mining data from documents and artifacts*)

This chapter focuses on documents and artifacts as two major categories of data. 'Document' is introduced as a broad term that can refer to a variety of data sources such as "official records, organizational promotional materials, letters, newspaper accounts, poems, songs, corporate records, government documents, historical accounts, diaries, autobiographies, blogs, and so on. These can be available in the physical environment, on websites, or both." (p. 163) Merriam and Tisdell discuss these documents under various categories including public, personal, and visual documents as well as popular culture documents like cartoons. Artifacts, on the other hand, are defined as physical objects or 'things' that can act as sources of understandings about various topics. Examples of such data sources are art pieces, instruments, utensils, symbols, and gifts. The chapter explores the nature of these two categories of data and their application in qualitative studies, as well as their limitations.

- **Mannay, D. (2016).** *Visual, narrative and creative research methods: Application, reflection and ethics*. **London: Routledge.**

As the title tells, the scope of Manny's book extends far beyond gathering visual data. It covers various theoretical, methodological, practical, and ethical considerations in social science research. Early in the book, the author clarifies this wide

scope as a broad scholarly undertaking: "Visual researchers have worked hard to overcome a pervasive textual bias and the argument that the social sciences are 'a discipline of words' ... in which there is no room for pictures, except as peripheral, supporting illustrations." (p. 1) The six chapters between the introduction and conclusion address the following main themes: a historical account of the application of visual methods; the role of de-familiarization in visual research methods; the issue of researcher position and the participatory side of visual research; analyzing and interpreting visual data; the practicalities of creative visual and narrative research; and, ethical considerations in creative and visual research methodology.

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Chapter 7
Data Analysis Through Coding

When the data collection process reaches a stage where enough evidence is collected in terms of the quantity and scope as well as quality and contextual depth, the focus of research should be directed toward the most challenging aspect of research, that is, making sense of the gathered data. The researcher embraces the adventures of the data gathering journey, hoping to obtain evidence that potentially contains hints, clues, bits of knowledge, and ideally *answers* to research questions. The endeavor of sense making out of the various bulks of data is the process of uncovering, discovering, and understanding these desired findings. The major question regarding this endeavor is about where these understandings reside in the apparently messy world of qualitative data and how they may be found and understood in relation to the research question, and applied in addressing a broader research issue. These concerns are tackled in a process traditionally known as data *analysis*.

Analyzing data in the sense of seeking meaning in pieces of evidence gained through the data collection process can happen from the beginning of the inquiry process, but research culminates in a stage of specifically focusing on data analysis. Ironically, however, details of the theoretical perspectives and practical procedures in analyzing qualitative data are not extensively discussed in introductory texts on social science qualitative inquiry (Saldana, 2011). Data analysis is, therefore, perhaps the least known aspect of qualitative language education research. In Saldana's words, "qualitative data analysis can be intricate and, at times, conceptual and abstract. …Just as there are multiple destinations in qualitative research, there are multiple pathways and journeys along the way." (2011, pp. 89–90) Thus, this chapter and the next one are devoted to detailed discussions of analyzing data in qualitative language education research.

Before we proceed, a preliminary note might be needed on an intersection of epistemology, methodology, and terminology. As in almost all other aspects of academic research, the predominant conception of data analysis, which extends from academia to public opinions, has been shaped based on positivist epistemological positions and has been named accordingly. The term *analysis* denotes the dissection

of things into their constitutive pieces and elements for scrutiny. It can refer to ways of dealing with mathematical problems, physical objects, and chemical substances, and this may extend to issues in biology, geology, and even some schools of linguistics. However, it may be illuminating to note that the application of this term in a so-called scientific sense is based on a rough idea of fragmenting phenomena into segments, doing some kind of atomistic examination, and assuming that the sum of the pieces equals the whole. This science-laboratory idea of analysis does not hold even in inferential statistical analysis of quantitative data, let alone qualitative analysis. However, the term is widely used in qualitative research to refer to the process of sense-making out of data. Therefore, while we continue to use it in a reconceptualized sense in this regard, we may need to remind ourselves that the contextual and holistic nature of data is an epistemological necessity that must be reflected in our methodology and what we mean is data exploration and making sense.

Grounded Theory

Perhaps the most widely used data analysis procedures in qualitative social science research are based on the approach known as *grounded theory* initiated by Glaser and Strauss (1967). They proposed the idea of grounded theory as "a general method of comparative analysis" (p. 2) aimed at "the discovery of theory from data systematically obtained from social research" (p. 3). Grounded theory is known to be a greatly "contested concept" (Bryant & Charmaz, 2007a, p. 3) and has created extensive discussions and disagreements. The philosophical, theoretical, and conceptual aspects of grounded theory as well as its practical application as a data analysis approach have been subject to many debates and have evolved in different forms during the past several decades (Bryant & Charmaz, 2007b; Hadley, 2017, 2020; Morse et al. 2009). These debates and discussions are beyond the scope of this book but it would be helpful for beginner qualitative language education researchers to gain a broad understanding of the perspective of grounded theory and a general idea of data analysis procedures based on this approach.

Grounded theory "is best thought of as a family of methods" (Bryant, 2017, p. 83) not a singular framework. Rather than a structured research design or a fixed set of techniques of data analysis, it can be perceived as a general approach and a broad perspective in qualitative inquiry with particular implications for data analysis. This perspective can "encourage researchers' persistent interaction with their data, while remaining constantly involved with their emerging analyses… [and] leads researchers to examine all possible theoretical explanations for their empirical findings" (Bryant & Charmaz, 2007a, p. 2). Therefore, the application of grounded theory in qualitative data analysis is itself a constructed process employed by the qualitative researcher to deal with socially constructed bodies of qualitative data. (See the section on "The Constructed Nature of Data" in the previous chapter.) As Charmaz states in his book titled *Constructing Grounded Theory*,

In their original statement of the method, Glaser and Strauss (1967) invited their readers to use grounded theory strategies flexibly in their own way. I accept their invitation and return to past grounded theory emphases on examining processes, making the study of action central, and creating abstract interpretive understandings of the data… I view grounded theory methods as a set of principles and practices, not as prescriptions or packages. (Charmaz, 2006, p. 9)

Practically, grounded theory perspectives have been mainly translated into a series of steps and procedures that are used to extract meanings embedded in the landscape of qualitative verbal data. These procedures, known as *coding*, have been proposed in different ways and with different terminology, but the essence of the idea of coding can be implemented in some major steps in dealing with qualitative data. "Coding is not specific to grounded theory methods, but is a key part of grounded theory methods as they make up part of the larger universe of interpretive research methods." (Broad, 2017, p. 95) Noticing and spotting any idea in any corner of the vast bodies of data that can signify even the slightest idea about the research question; understanding overt or covert patterns of interconnections among such significant ideas; extracting, specifying, and illustrating these patterns in the form of coherent notions and conceptions; and interpreting these conceptual findings in relation to the research question and understanding new aspects of the research problem are the major steps in coding practices based on grounded theory. Adhering to the notion of contextualization in qualitative inquiry, coding procedures begin with raw data and lead to meanings and theoretical understandings emerging from the context of research (Saldana, 2013, 2014; Yin, 2011)

Initial Coding

Regardless of the quantity of your data, the indispensable first step in coding is simply reading, re-reading, and re-re-reading of the data; story by story, event by event, sentence by sentence, and word by word. There are two important facets to a fruitful reading of data at this stage. On the one hand, you need to have already developed a deep understanding of your research question in terms of its theoretical underpinnings and also what you want to know about it. This in-depth theoretical understanding is crucial to the coding of data as will be seen later in this chapter. On the other hand, a deep contextual understanding of data needs to have already been gained through the data collection stage. Data collection and exploration stages are known as two separate stages of experimental research. But in qualitative inquiry, they are not independent processes. In qualitative research, there is an overall process of data collection/analysis which starts with a focus on data gathering and an ancillary data exploration side. As you proceed with the project, the focus shifts toward more analysis, and data collection becomes less of a focus.

Therefore, from the very beginning of the data collection process, you keep an analytical eye on your context and data. This preliminary thought on data exploration, shaped within the actual context of the study, is an important element in the

early steps of your data coding. Through the initial rounds of reading and re-reading the data (known as open or *initial* coding), the aim is to find *spots* related to your research question. While you read through the data, you look for words, sentences, paragraphs, and events that somehow include a message or idea that could be related to your research question and help you address even a small aspect of it. This is not very much about deep and careful reading of the data but about searching for data segments that signify a point. "Remain open… Stay close to the data… Move quickly through the data." (Charmaz, 2006, p. 49) By finding these spots and marking them on the landscape of your data (on paper or screen) you are practically dealing with codes and you are already well on the path of *coding*.

The word code is indeed the right term here. Codes can be words, statements, or a set of interactions that are clearly related to your research question but, in many cases, codes are not so overt. They are not necessarily reflected in certain words related to your research question or an explicit statement about it. A code can be an apparently irrelevant word—or even something less than a word, like an exclamation—in a corner of the bulk of your data; it can be a combination of a few words; it can take the shape of a lump of interactions between two or more people; it can be one or more paragraphs of the text of your data; sometimes a code might be an entire story; and, in the case of multimodal data, a code can be a part of a picture. Therefore, repeating myself, I would say that in your initial coding, look for things that you think can include a point, idea, message, hint, clue about any aspect of your research question.

Rashed (2016) *set out in her master's thesis journey to investigate an aspect of cultural considerations in the teaching of English as a foreign language. Her research problem concerned the possible reproduction of cultural perspectives through the teaching and learning of English in Iranian private language institutes. More specifically, her main research question focused on the possibility of the reflection and reproduction of certain perceptions and attitudes toward lifestyle issues in class discussions at upper-level courses of English at a well-known English language institute in Karaj, Iran.*

The assumption was that language learning and teaching contexts can be considered as environments in which languages and their cultures are presented to learners, and that involvement in these environments might influence young learners' evaluative tendencies and psychological orientations about different lifestyles through time. The study concentrated on the nature and contents of such discursive reproduction in the specific context of English class discussions about objects, behaviors, preferences, activities, etc. which are overall known as lifestyles.

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The context of the study was an English language institute with 60 branches all around the country, presenting English language classes to both boys and girls at all levels of language proficiency. The participants were 10 teachers and 62 language learners in their classes at intermediate, upper-intermediate, and advanced levels.

Data collection was carried out by the researcher through 200 hours of participation, observation, and audio recording along with writing fieldnotes and reflective memos over a period of four months, as well as through interviews with selected participants. Data analysis was done based on grounded theory perspectives and through coding. I rely on selected sections of Rashed's findings and discussions along with excerpts from her observation data to illustrate different stages of the coding process. (A version of this study was later published in Compare: A Journal of Comparative and International Education [Mirhosseini, Sazvar, & Rashed, 2017]*).*

It is not easy to depict the dynamic and challenging process of coding that happens through a long period of time. However, look at the following extracts of Rashed's observation data and imagine that they are marked (color coded) in their scattered spots in tens of pages of her transcripts and fieldnotes representing tens of hours of foreign language classroom discussions over several months.

What is important to imagine is the gradual process of detecting and spotting each one of these data segments through several rounds of reading and marking the points 'related' to the research question. All of these pieces of quotes represent a part of a classroom discussion that is, one way or another, related to a lifestyle issue in the sociocultural context of concern:

- (Session 2A) In a picture of a boy and a girl hugging, the girl is omitted in students' books. Ms. Akbari shows them the original censored pictures.
- (Session 2A) Kimiya: *If there is an old woman or man on a bus, I'm ready to change my seat with him or her. Iranian people are sympathetic and want to help others.*
- (Session 2A) Ms. Akbari: *Gambling is bad in Islam. They don't like it. If you win it's good.*
- (Session 4E) Mr. Esfandiari: *The word juice in your book is not correct. The word champagne is censored.*
- (Session 5H) Alireza: *Future of young people is dark. They don't have jobs. Favoritism is important these days.*
- (Session 5R) Ms. Rasooli: *I'm independent but my grandma could not live without her husband. Women's roles have changed. In the past, women could not see the man but now everything is arranged.*
- (Session 6A) Kia: *Foreigners think that Iranians are terrorists.*

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- (Session 6M) Arman: *In Islam, alcohol is forbidden.*
- (Session 8B) Mr. Baghaei: *These days, people do lots of plastic surgeries because of lack of self-confidence.*
- (Session 8F) Ms. Fazeli: *What will you do if there was no food in a party?* Ali*: I'll drink a lot.*
- (Session 8K) Yasamin: *Friendships are OK. Marriage is not reasonable.*
- (Session 9Z) Amir: *Marriage used to be easier before. Now it has been so expensive and complicated.*
- (Session 10A) Ms. Akbari: *In India and Japan we may be culturally shocked. In Malaysia I saw people eating food with their hands; it's not hygienic and clean. In Japan people eat food with chop sticks.*
- (Session 10A) Ms. Akbari: *You have to wear a scarf but you don't have to wear chador.*
- (Session 10A) Sina: *I saw two women in Bushehr who were two wives of a man, they were like friends…*
- (Session 10F) Ali: *Among all important dates in my life, I just have my wife's birthday in my mind.* Ms. Fazeli: *Very good, keep going.*
- (Session 10H) Ms. Hosseini: *I like British people, it's high class. I like British culture and behavior.*
- (Session 10H) Ms. Hosseini: *Most questions in job interviews are religious. Can you handle these questions?*
- (Session 10M) Mr. Moradi: *The entertainments in Iran are limited to social networks and applications. People do not interact with each other anymore.*
- (Session 11B) Amir: *Having a relationship is like a habit and I don't' get depressed. You should be able to set yourself free, you have to build another relationship, a new glass is better than a fixed one.*
- (Session 11M) Mr. Moradi: *Iran is a third world country. Child labor is very common in third world countries.*
- (Session 12B) Mr. Baghaei: *If you were born in another country your religion was not Islam. So we should obey our parents in this case. We don't have any choice.*
- (Session 12F) Ms. Fazeli: *Talk about special food that you know in the city you were born.*
- (Session 12K) Hasti: *For all matters I talk to my mom. We fight sometimes because of having different ideas but at the end we come up with a conclusion.*
- (Session 12Z) Mr. Zarinpoor*: I'm not a religious person but I pretend to be religious for getting a loan from a bank.*
- (Session 13B) Kimiya: *Boys and girls listen to each other.* Mr. Baghaei: *No, as long as the girl is beautiful we listen to her.*

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- (Session 13B) Mr. Baghaei: *Married couples do not understand each other because they have their own problems. Men are good liars. Women are nosy.*
- (Session 13E) Mr. Esfandiari: *In foreign countries like Spain and Italy there are lots of special ceremonies such as throwing tomato to each other… Furthermore, there are many unusual and exciting customs and traditions. Nonetheless in Iran, there is not even a special ceremony.*
- (Session 13Z) Mona: *Wives and husbands do not listen to each other.* Mr. Zarinpoor: *Women yes, but men no, especially when we are eating something.*
- (Session 14H) Ms. Hosseini: *In foreign countries old people go to nursing home and make friends, there are very modern. They are different from nursing homes in Iran.*
- (Session 14M) Mr. Moradi: *I've been smoking for about ten years. My parents know it and I'm relaxed. Three of us sit in front of TV and smoke.*
- (Session 15B) Amir: *Turkish people don't have a good behavior with each other; specially men. It's different from the movies they make.*
- (Session 15Z) Soheila: *I love American and Italian people. They are so friendly and free to do whatever they want.*
- (Session 16E) Mr. Esfandiari: *As an Iranian, what food do you suggest*? Students: *Kabab, Abgoosht, Kalepache.*
- (Session 16F) The names of some drinks in students' books are changed. Ms. Fazeli tells them the censored words—beer, wine, etc.
- (Session 17B) Amir: *My father is so strict, wakes me up at 6 every morning, and turns the volume of TV up.* Mehdi: *My father is so strict too. You can't live with him for a long time. I can't tell him jokes.* Mr. Baghaei: *When my father spends his time with somebody for a long time, he will start nagging but when I talk to him on the phone everything is OK.*

As noted earlier, crucial in this process is your understanding of the research question and your awareness of the contextual situatedness of your data. You should have both a deep understanding of your research question and an intimate familiarity with your data in the specific context of concern. This is because your initial coding is merely spotting links between these two: pieces of the data and aspects of the research question. As you see in the examples above, the concept of being *linked* can be realized in a million ways. A researcher who is aware of the depth of the research questions, knows the theoretical background of the research issue, and views the collected bodies of data as constructions within a certain context, is best equipped to make the judgment about this relatedness of pieces of data—that is, codes—to the research question.

The outcome of this initial coding process is a relatively large number of spots/items in different parts of your data all linked, in some way or another, to your research question. But how do we know that we have uncovered all the codes in the data and that the initial coding stage is over? Contextually rooted qualitative data bodies are hardly *exhausted*, as different understandings of the research question, deeper readings of the related literature, and gaining further insight into the context of our data may continually direct us to further new initial codes. Nonetheless, your particular theoretical knowledge, your understanding of the research question, your awareness of the various aspects of the context of study, and the quantity and quality of your reading and re-reading of the data have a limit.

As you read the data multiple times in search of initial codes, you may notice that in the first few rounds of reading, you find more and more codes. This increase continues up to a certain number of rounds. Then, in each round of later re-reading, smaller and smaller numbers of codes appear to be spotted. At a point where you realize that a particular round of reading has added really little to your codes, then you can say that the initial coding stage is practically done. Naturally, you do not expect certain *measures* of determining the end of initial coding, and obviously one would not expect *some experts* to have set a certain number of codes as the threshold of acceptable initial coding. Qualitative research is a site of continuous researcher decision-making and one of the decisions to be made is that you have done justice to the reading of the data in the initial coding stage and that you have not missed considerable spots in the landscape of data which can bear some message about what the research question is addressing.

There are two final notes in this section about the initial coding procedure. In deciding about the codes, in some cases it may be difficult to clearly determine that a particular point is really related to your research question or not. Therefore, in marking your codes, mark even the slightly related and possibly related points. If you include such points in your codes, later, you may see a clear link and include this type of codes in the analysis, or you may decide that they are irrelevant and remove them. The inclusion of *maybe-codes* is no practical burden, but ignoring them from the beginning might mean losing potentially important parts of your data. The other note here is about the actual mechanics of marking the codes. In the initial and focused coding stage, you should visually mark the emerging codes and patterns so that you can see the spots in the landscape of the text of your data. If the text is on paper, traditional color coding is useful in this regard. If the text is on the computer screen, different visual tools may be used, including the ones provided in different types of software specifically developed to deal with qualitative data (See the section on "Computer-Supported Data Analysis" in the next chapter.)

Focused Coding

As early as the first round of reading the data—and probably even earlier, when you are collecting data—you not only see separate spots and individual items and ideas in the form of words, sentences, events, etc. that are related to your research question and are later marked as initial codes, but you also notice interconnections, similarities, and repetitions among the individual codes. It is not the case that you have hundreds of nodes of disconnected individual codes clinging to the idea of your research question. Each code has a justification for being marked as a code related to the research question, that is, each code has something *in it* that can be a clue about a partial answer, an explanation, a hint, or even a new question about your research question. Very frequently, initial codes share the clues that mark them as a codes.

In other words, several codes can be marked for the same reason, that is, they can hint at the same idea and understanding about the research question. When you start to see the relatedness, similarity, or sameness of individual codes, they start to come together as *patterns*. Early patterns may be shaped by a few codes that can later come together as more visible patterns comprising codes from different parts of the landscape of data. One feature of these patterns is that they emerge from the texture of the contextually rooted bodies of data and can, therefore, represent interconnected patterns of understandings about the context of study. By now, you have moved from initial coding to a more *focused coding* stage of dealing with interconnected, similar, and repeated codes.

"Focused coding means using the most significant and/or frequent earlier codes to sift through large amounts of data. One goal is to determine the adequacy of those codes." (Charmaz, 2006, p. 57) An important aspect of the adequacy and meaningfulness of early codes is the gradual emergence of interconnected patterns of related codes that can gradually provide you with more pervasive conceptions and understandings about aspects of your research question. The emerging patterns move from clusters of small numbers of related codes to larger and more conspicuous patters shaped by some of the earlier clusters. Each one of the individual codes marked at the stage of initial coding sit in their own place in a specific set of data, but emerging patterns at the stage of focused coding bring together not only the individual codes from different parts of a body of data but also those from different corners of different types of data that may be examined in a study.

Back to Rashed's (2016) *study, the early codes, which were characterized by a link to the relatively broad notion of lifestyles raised in language classroom discussions, start to be seen as separate patterns. The small number of examples provided in the previous section are now seen below in four different categories that can provide at least a snapshot of the focused coding process, centrally including emerging patters. Like the individual codes, the patterns should be categorized by their potential orientation toward addressing the research question:*

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Life in Iran

- (Session 2A) Kimiya: *If there is an old woman or man on a bus, I'm ready to change my seat with him or her. Iranian people are sympathetic and want to help others.*
- (Session 5H) Alireza: *Future of young people is dark. They don't have jobs. Favoritism is important these days.*
- (Session 5R) Ms. Rasooli: *I'm independent but my grandma could not live without her husband. Women's roles have changed. In the past, women could not see the man but now everything is arranged.*
- (Session 6A) Kia: *Foreigners think that Iranians are terrorists.*
- (Session 8B) Mr. Baghaei: *These days, people do lots of plastic surgeries because of lack of self-confidence.*
- (Session 9Z) Amir: *Marriage used to be easier before. Now it has been so expensive and complicated.*
- (Session 10A) Ms. Akbari: *You have to wear a scarf but you don't have to wear chador.*
- (Session 10A) Sina: *I saw two women in Bushehr who were two wives of a man, they were like friends…*
- (Session 10M) Mr. Moradi: *The entertainments in Iran are limited to social networks and applications. People do not interact with each other anymore.*
- (Session 11M) Mr. Moradi: *Iran is a third world country. Child labor is very common in third world countries.*
- (Session 12F) Ms. Fazeli: *Talk about special food that you know in the city you were born.*
- (Session 16E) Mr. Esfandiari: *As an Iranian, what food do you suggest*? Students: *Kabab, Abgoosht, Kalepache.*

Religion

- (Session 2A) In a picture of a boy and a girl hugging, the girl is omitted in students' books. Ms. Akbari shows them the original censored pictures.
- (Session 2A) Ms. Akbari: *Gambling is bad in Islam. They don't like it. If you win it's good.*
- (Session 4E) Mr. Esfandiari: *The word juice in your book is not correct. The word champagne is censored.*
- (Session 6M) Arman: *In Islam, alcohol is forbidden.*
- (Session 8F) Ms. Fazeli: *What will you do if there was no food in a party?* Ali*: I'll drink a lot.*
- (Session 10H) Ms. Hosseini: *Most questions in job interviews are religious. Can you handle these questions?*
- (Session 12B) Mr. Baghaei: *If you were born in another country your religion was not Islam. So we should obey our parents in this case. We don't have any choice.*

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- (Session 12Z) Mr. Zarinpoor: *I'm not a religious person but I pretend to be religious for getting a loan from a bank.*
- (Session 16F) The names of some drinks in students' books are changed. Ms. Fazeli tells them the censored words—beer, wine, etc.

Relationships

- (Session 8K) Yasamin: *Friendships are OK. Marriage is not reasonable.*
- (Session 10F) Ali: *Among all important dates in my life, I just have my wife's birthday in my mind.* Ms. Fazeli: *Very good, keep going.*
- (Session 11B) Amir: *Having a relationship is like a habit and I don't' get depressed. You should be able to set yourself free, you have to build another relationship, a new glass is better than a fixed one.*
- (Session 12K) Hasti: *For all matters I talk to my mom. We fight sometimes because of having different ideas but at the end we come up with a conclusion.*
- (Session 13B) Kimiya: *Boys and girls listen to each other.* Mr. Baghaei: *No, as long as the girl is beautiful we listen to her.*
- (Session 13B) Mr. Baghaei: *Married couples do not understand each other because they have their own problems. Men are good liars. Women are nosy.*
- (Session 13Z) Mona: *Wives and husbands do not listen to each other.* Mr. Zarinpoor: *Women yes, but men no, especially when we are eating something.*
- (Session 14M) Mr. Moradi: *I've been smoking for about ten years. My parents know it and I'm relaxed. Three of us sit in front of TV and smoke.*
- (Session 17B) Amir: *My father is so strict, wakes me up at 6 every morning, and turns the volume of TV up.* Mehdi: *My father is so strict too. You can't live with him for a long time. I can't tell him jokes.* Mr. Baghaei: *When my father spends his time with somebody for a long time, he will start nagging but when I talk to him on the phone everything is OK.*

Other Countries

- (Session 10A) Ms. Akbari: *In India and Japan we may be culturally shocked. In Malaysia I saw people eating food with their hands; it's not hygienic and clean. In Japan people eat food with chop sticks.*
- (Session 10H) Ms. Hosseini: *I like British people, it's high class. I like British culture and behavior.*
- (Session 13E) Mr. Esfandiari: *In foreign countries like Spain and Italy there are lots of special ceremonies such as throwing tomato to each other… Furthermore, there are many unusual and exciting customs and traditions. Nonetheless in Iran, there is not even a special ceremony.*
- (Session 14H) Ms. Hosseini: *In foreign countries old people go to nursing home and make friends, there are very modern. They are different from nursing homes in Iran.*
- (Session 15B) Amir: *Turkish people don't have a good behavior with each other specially men. It's different from the movies they make.*
- (Session 15Z) Soheila: *I love American and Italian people. They are so friendly and free to do whatever they want.*

As illustrated here, a feature of the emerging early patterns and the later stronger patterns that they shape is that they represent the entire landscape of data. The emerging patterns ideally comprise many codes from all bodies of data representing many participants, settings, time periods, and data collection procedures. This is a feature of good coding that contributes to the quality of qualitative research. The obsession with the technicality of coding should not distract us from the central conceptual aspect of the coding process: individual codes signify separate segments of data that bear some point about the research question, and the emerging patterns of interconnected codes provide further contextualized understandings about it. When early patterns join to shape stronger patterns of more interconnected and similar codes, gradually the patterns can be seen as larger groups of codes in the form of a limited number of major categories or *themes*.

Axial Coding

When the emerging patterns of individual codes, which are still relatively numerous, start to shape major thematic categories, the data exploration process reaches a stage known as *axial coding*. Hundreds and even thousands of codes and early patterns come together along the axis of a few topics and shapes categories that create a few major themes. A minute of distance from the technicalities of dealing with data will tell you that a major theme means a collection of pieces of evidence from different people, settings, and time periods of your data collection phase that include some idea about aspects of your research question. So, it looks like the project is moving in a direction that provides you with new insights with respect to the question. When the major themes are shaped, your collected data bodies have been subjected to two important processes: data reduction, which removes the sections of data irrelevant to your research question, and data organization, which means that the reduced bodies of data are now put into meaningful categories. But these major categories, which relatively coherently represent the vast landscape of data, should be seen in the form of a structure of categories and subcategories. Around this stage and throughout the later steps, the (sub)themes can be labeled with specific titles that represent their content. The labels and titles can be sometimes picked up from the very text of the data—this is known as *in vivo* coding (Charmaz, 2006; Saldana, 2013).

Half a dozen major themes are still far from a form that can be easily interpreted in terms of overall understandings to address the research question. Thus, to further delve into the meanings situated within the data, we need to extend the axial coding process by structuring the bulk of data extracts in each major theme into one or more levels of minor themes. The selected pieces of data that are now gathered within a major theme share features that put them into the category of that particular theme. Therefore, each major theme implies a conceptual understanding about an aspect of the research question, and under each major theme, there are minor categories that address more specific concerns related to the research question. Some of

the smaller patterns of codes under each major theme may also be re-categorized to shape new categories. On this basis, as an outcome of the axial coding process, you come up with a thematic structure of major and minor themes/categories, each relying on segments of data to provide insights and understandings about the research question.

Therefore, more rounds of reading the data extracts under each major theme is needed. A process similar to the primary open-focused-axial coding is done, this time within the scope of a major theme. It is, therefore, controlled, limited, less time-consuming, and more straightforward. The outcome of this process is a few subthemes each containing a number of data excerpts from the wide landscape of data. The subthemes are in fact data-rooted constructs that can help us gain new understandings of minor aspects of the research question. When these minor themes join, they shape the major ones that can mediate understanding wider and deeper aspects of the research question. When the major themes are all considered as a whole, they address the totality of the concern reflected in the research question.

Life in Iran

Everyday life

- (Session 10M) Mr. Moradi: *The entertainments in Iran are limited to social networks and applications. People do not interact with each other anymore.*
- (Session 2A) Kimiya: *If there is an old woman or man on a bus, I'm ready to change my seat with him or her. Iranian people are sympathetic and want to help others.*
- (Session 8B) Mr. Baghaei: *These days, people do lots of plastic surgeries because of lack of self-confidence.*

Marriage

- (Session 10A) Sina: *I saw two women in Bushehr who were two wives of a man, they were like friends…*
- (Session 5R) Ms. Rasooli: *I'm independent but my grandma could not live without her husband. Women's roles have changed. In the past, women could not see the man but now everything is arranged.*
- (Session 9Z) Amir: *Marriage used to be easier before. Now it has been so expensive and complicated.*

Food and clothing

- (Session 12F) Ms. Fazeli: *Talk about special food that you know in the city you were born.*
- (Session 16E) Mr. Esfandiari: *As an Iranian, what food do you suggest?* Students: *Kabab, Abgoosht, Kalepache.*
- (Session 10A) Ms. Akbari: *You have to wear a scarf but you don't have to wear chador.*

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Political attitudes

- (Session 6A) Kia: *Foreigners think that Iranians are terrorists.*
- (Session 5H) Alireza: *Future of young people is dark. They don't have jobs. Favoritism is important these days.*
- (Session 11M) Mr. Moradi: *Iran is a third world country. Child labor is very common in third world countries.*

Religion

Religious beliefs

- (Session 10H) Ms. Hosseini: *Most questions in job interviews are religious. Can you handle these questions?*
- (Session 8F) Ms. Fazeli: *What will you do if there was no food in a party?* Ali*: I'll drink a lot.*
- (Session 12Z) Mr. Zarinpoor*: I'm not a religious person but I pretend to be religious for getting a loan from a bank.*

Islam in society

- (Session 2A) Ms. Akbari: *Gambling is bad in Islam. They don't like it. If you win it's good.*
- (Session 6M) Arman: *In Islam, alcohol is forbidden.*
- (Session 12B) Mr. Baghaei: *If you were born in another country your religion was not Islam. So we should obey our parents in this case. We don't have any choice.*

Religious rules in the classroom

- (Session 2A) In a picture of a boy and a girl hugging, the girl is omitted in students' books. Ms. Akbari shows them the original censored pictures.
- (Session 16F) The names of some drinks in students' books are changed. Ms. Fazeli tells them the censored words—beer, wine, etc.
- (Session 4E) Mr. Esfandiari: *The word juice in your book is not correct. The word champagne is censored.*

Relationships

Boys and girls

- (Session 8K) Yasamin: *Friendships are OK. Marriage is not reasonable.*
- (Session 11B) Amir: *Having a relationship is like a habit and I don't' get depressed. You should be able to set yourself free, you have to build another relationship, a new glass is better than a fixed one.*
- (Session 13B) Kimiya: *Boys and girls listen to each other.* Mr. Baghaei: *No, as long as the girl is beautiful we listen to her.*

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Husband and wife

- (Session 10F) Ali: *Among all important dates in my life, I just have my wife's birthday in my mind.* Ms. Fazeli: *Very good, keep going.*
- (Session 13Z) Mona: *Wives and husbands do not listen to each other.* Mr. Zarinpoor: *Women yes, but men no, especially when we are eating something.*
- (Session 13B) Mr. Baghaei: *Married couples do not understand each other because they have their own problems. Men are good liars. Women are nosy.*

Parents and children

- (Session 12K) Hasti: *For all matters I talk to my mom. We fight sometimes because of having different ideas but at the end we come up with a conclusion.*
- (Session 17B) Amir: *My father is so strict, wakes me up at 6 every morning, and turns the volume of TV up.* Mehdi: *My father is so strict too. You can't live with him for a long time. I can't tell him jokes.* Mr. Baghaei: *When my father spends his time with somebody for a long time, he will start nagging but when I talk to him on the phone everything is OK.*
- (Session 14M) Mr. Moradi: *I've been smoking for about ten years. My parents know it and I'm relaxed. Three of us sit in front of TV and smoke.*

Other Countries

Social behavior

- (Session 10H) Ms. Hosseini: *I like British people, it's high class. I like British culture and behavior.*
- (Session 15Z) Soheila: *I love American and Italian people. They are so friendly and free to do whatever they want.*
- (Session 15B) Amir: *Turkish people don't have a good behavior with each other specially men. It's different from the movies they make.*

Differences with Iran

- (Session 10A) Ms. Akbari: *In India and Japan we may be culturally shocked. In Malaysia I saw people eating food with their hands; it's not hygienic and clean. In Japan people eat food with chop sticks.*
- (Session 14H) Ms. Hosseini: *In foreign countries old people go to nursing home and make friends, there are very modern. They are different from nursing homes in Iran.*
- (Session 13E) Mr. Esfandiari: *In foreign countries like Spain and Italy there are lots of special ceremonies such as throwing tomato to each other… Furthermore, there are many unusual and exciting customs and traditions. Nonetheless in Iran, there is not even a special ceremony.*

There are a few remaining points about categorizing data segments into a structure of themes and subthemes. One simple point is that individual codes and data segments can be put in different subcategories because, for example, a single sentence may include points that can be associated with various other patterns of meaning. Moreover, the categorization of codes and patterns is never neat and linear. It always includes several rounds of moving codes to different categories and subcategories. The overall thematic structure may also change because throughout the process of axial coding, the researcher may change the position of minor and major themes in order to organize the extracted data patterns in the most illustrative way. In this process, most of the time there is a category of miscellaneous codes as well as categories of discrepant and negative cases that might indicate understandings not in line with the direction of the major findings.

Theoretical Coding

It is extremely important that the researchers keep in mind the contextualized, holistic, and complex nature of questions and answers in qualitative inquiry. Nevertheless, the coding process so far appears to be an all-out attempt at segmenting data, removing data pieces from their context, and reducing the lifelike complexity of thoughts, statements, acts, and events that are recorded in the data. Is our data exploration technique practically proceeding as *analysis* in the sense of taking the bits and pieces of data apart? Is it paradoxically working against the epistemological assumptions of qualitative research?

The surface procedure of coding does look like the fragmentation, de-contextualization, and reduction of data. However, it should be noted that spotting data segments as codes—based on their link to the research question—is based on a contextual understanding of the complexities of data. Accordingly, extracting data pieces is done on the basis of contextual, holistic, and complex understandings of participants, settings, and events in the field. Moreover, data excerpts, which are put together under themes and subthemes, are supposed to be extracted from the primary text of data with as much information as possible about their standing in the actual landscape of data. Therefore, rather than being de-contextualized and reduced, segments of data are re-contextualized and reconstructed to build complex and deep understandings about the research concern. The data bodies are in a sense "disassembled", but then "reassembled" again (Yin, 2011, p. 179).

Therefore, the entire body of data is restructured in a way that can be applied in providing insights about the issues of concern in the research question as a whole. Apart from the researcher's commitment to a contextualized view of data excerpts in the process of initial, focused, and axial coding, we are to deliberately focus on the reconstruction of the whole data-based understanding of research findings in a final stage known as *theoretical coding*—though it no longer looks likes *coding* as such. Theoretical coding is in fact the stage of answering the research question.

Obviously, the notion of *answer* here is not about a yes/no response or a clear-cut measure, or a fixed set of exact findings. The outcome of your data analysis helps you *address* the research question by providing further information, clarifications about aspects of the research issue, tentative arguments for or against certain positions, in-depth insights and understandings about the theoretical and practical concerns reflected in the research question, further understanding about the contexts and participants of the study, or further questions and new problems or issues about the research topic.

Theoretical coding then, is the stage of addressing the research question. Imagining a tree-diagram, if we see the research question as the top most conceptual concern in a study, the axial coding stage provides a few major themes that are attached to the research question as the major nodes. Then each major theme has its own nodes that are the minor themes. If there is another level of subthemes, they are attached to the minor themes. The last level of subthemes has attached to itself several individual codes rooted in the data. Each of these individual codes are indicative of some idea about the research question; each subtheme contains broader indications shaped by the collective individual codes attached to it; each major theme brings its comprising minor themes together to convey still broader ideas about the research question; and the major themes together provide the overall idea that has emerged from the data with regard to the research question as a whole. The research question can be addressed at all of these different levels.

In bringing the pieces of data and the apparently scattered subthemes together and addressing parts of her research question at the stage of theoretical coding, Rashed (2016) *argues that the cultural scope of classroom discussions of concern extends beyond teaching language forms. Perspectives and positions regarding different lifestyles do appear to be an integral part of the discussions in this context.*

In the atmosphere of these classrooms, mixed ideas about the local and foreign lifestyle tendencies seem to be resonating and, considering the role of discourse in the reproduction of attitudes and perspectives, the discursive context of these classrooms appears to be normalizing new lifestyle orientations partially imported through the very process of English language education.

Extensive discussions of many contextual aspects of the research issue may be needed at this stage but the overall position of the researcher in bringing the findings together and addressing the research question is that the emerging themes indicate that alternative lifestyle attitudes and tendencies are in subtle competition against traditional views in the society and the new perspectives can be naturalized and reproduced through the foreign language teaching processes.

Issues in Coding

As I noted earlier in this chapter, the theoretical and practical aspects of qualitative data analysis, grounded theory, and coding procedures are all contested and debated. The coding process is conceptually and procedurally more complicated than it might appear first. Therefore, in this final part of the chapter, I touch upon a few further concerns that may help with a more profound understanding and more fruitful application of coding as a qualitative data analysis procedure. I address the conception of theory and debates around it in grounded theory; the nonlinearity of coding procedures as a complex web of iterative practice rather than a simple set of technical steps; and the issue of terminology and the application of various terms that are used to refer to different aspects of coding in qualitative research literature.

The Notion of 'Theory'

Throughout the relatively vast literature of grounded theory, there seems to be an emphasis on hypothesis generation and inferring *theory* from the data through the process of analysis. However, the notion of theory seems to remain vague. It is clear that in contrast to hypothesis-testing approaches in quantitative research that are rooted in hard science notions of hypothesis and theory, qualitative inquiry adopts an inductive/abductive hypothesis generating approach. However, developing theories as such is a difficult conception to tackle in the context of social sciences. More specifically, in the field of language education, one can hardly talk of delineated language education theories even in experimentally oriented areas like psycholinguistics and Second Language Acquisition. Therefore, it is naturally not helpful to discuss the generation of grand theories through the analysis of qualitative data. Rather than thinking about theories that can emerge from the analysis of data through coding procedures, I would say that inductive/abductive qualitative data analysis based on grounded theory perspectives and through coding can create *grounded theoretical understandings* rooted in contextualized qualitative data.

The Iterative Nature of Coding

The discussion of separate phases of coding may draw an image of coding as a fixed set of steps linearly carried out one after another. It might imply that after you finish data collection, you do the initial coding; when it is done, you take the initial codes to the focused coding stage; then you carry the patterns to the axial coding stage; and finally, you do the interpretations and extract some new ideas in the theoretical coding stage. However, this is not the case. The separation of the

coding stages is for the purpose of discussion and elaboration. Otherwise, in the actual data analysis process, making sense of data is an iterative process of living with the data. There is a long continuum with noticing specific individual points related to the research question at the one end and making broad inferences and gaining new insights about the question at the other end. The first end can be located perhaps in the first step of your data collection, not necessarily after all bodies of data are collected. What we know is that you see more and more of individual points as codes, you see patterns, you categorize them into thematic structures, and you interpret them.

However, the steps and stops on the path of data analysis, turnarounds and repetitions, hesitations and reflections, undo and redo decisions, speed-ups and slowdowns, etc. are part of the essence of qualitative data analysis based on coding procedures. From the very beginning of your data analysis—which may be sometime during the data collection process—when you see a first codes, you cannot help thinking about the relatedness of the codes and their possible categorization as well as their interpretation. Therefore, away from the fragmented presentation of the coding stages, the actual process of coding is one whole process: "Coding means naming segments of data with a label that simultaneously categorizes, summarizes, and accounts." (Charmaz, 2006, p. 43). Even at a point when you think the data analysis in your study is done, the very understanding that you gain through the process of analysis may convince you to do the entire analysis again (Saldana, 2013). "An 'Aha! Now I understand,' experience may prompt you to study your earlier data afresh." (Charmaz, 2006, p. 58)

The Issue of Terminology

In addition to the notes on the concepts of *analysis* and *theory* presented in the introductory paragraphs and the section on "The Notion of 'Theory'" earlier in this chapter, there are a few other terminological considerations related to qualitative data analysis and coding. In reading the literature of qualitative research methodology, beginner qualitative researchers should not expect agreed-upon and neatly defined terms used by all writers. Terms such as code, pattern, (major/minor) category, subcategory, (major/minor) theme, and subtheme may be used in different ways and with different conceptions. The number of the so-called stages and steps of coding proposed by different scholars may also vary and the terms that are used to refer to different coding stages can be different.

Moreover, the very idea of specifying codes and categorizing them based on emerging patterns may be named differently. Themes and subthemes can be made by data extracts based on the structure and elements of already-existing frameworks rather than emerging ones. In such cases the entire process may be called *thematic analysis* rather than coding (Given, 2008). In qualitative content analysis, which is used in analyzing documents and similar data, the emerging patterns tend to be

called (sub)categories rather than (sub)themes. Considering such variations, rather than entangling themselves with terms and labels, beginner researchers may find it more helpful to concentrate on the conceptual aspect of a process of making sense of data.

Questions

- **In the initial coding stage, can lexical search and focusing on specific terms and words help with spotting early codes?**

Usually, concerns that are addressed in qualitative language education research questions are not expressed in a single word or a few fixed ones. It is difficult to imagine a theoretical concept or a practical notion the discussion of which necessarily entails the use of specific words. In the case of almost all issues of language education, either at the macro-level sociocultural concerns or at the level of micro-considerations in classroom language teaching and learning, one can easily imagine a related point expressed without the use of technical terms defined to discuss that particular notion. For example, when the research problem focuses on students' attitudes or perceptions about language learner autonomy, you cannot expect your observation data, interviews, or learner diaries to include many instances of the words—attitude, perception, and autonomy. These are conceptions that may be seen as embedded in data in a myriad of ways.

Many codes that are actually related to our research question can be expressed through words other than the ones that we think are associated with a certain topic. Moreover, many relevant points in our data may be detected in stretches of verbal data longer than single words. We may code multiple word pieces, part of a sentence, a full sentence, and pieces of texts beyond a sentence as a point related to our research questions. Therefore, searching only for parts of the data that contain a certain word is usually unhelpful. Exceptions may be seen in early stage coding of data in addressing a focus point that necessarily concerns a proper name. For example, if the research question is about a policy concern in a number of documents specifically about a country, an early stage of coding can be searching for all paragraphs that contain the name of that country. This might be seen as a kind of pre-initial coding.

- **How many codes do we need to shape a major theme? How many of them are needed for a subtheme?**

To begin with, we need to understand that *how many* is not the only, and even not the most important, concern in shaping a theme. The significance of the messages we notice in a group of codes in data is the most important consideration that brings the emerging patterns of early codes together and shapes the *character* of a theme or subtheme. When several groups of related patterns—each potentially comprising tens of codes—come together, the most important aspect of seeing them as a

coherently interwoven theme is how they join to address the research question from an important point of view. Also, in considering the priority and importance of the emerging themes when we are presenting them, the theme that comprises the largest number of codes is not necessarily the most important one. The importance of a theme is mainly based on how significantly it can address the research question. It seems obvious that usually a handful of codes coming together in a pool of thousands of codes and making some patterns cannot qualify as a major or even minor theme in the coding process. Therefore, the frequency and number of a group of codes does count as one thin criterion to consider in this regard, but not the most important one.

- *Is there any ideal or optimum number of themes and subthemes to emerge from the data through the coding process?*

The coding process concentrates on finding points related to the research question that may come together as patterns and, later, as themes. The only ideal in the process of research is for your data collection to proceed in a way that contains more and more of these points that can explicate more and more about what we intend to examine. The relevant points we find in our data, the patterns that take shape, and the (sub)themes that emerge—both in terms of numbers and in terms of meanings and the nature of understandings that they create—are to *emerge* from data.

- *Is there a way to check the relevance of the coding process at different stages so that the emerging codes, patterns, and categories remain relevant and meaningful rather than distract us from a real meaning-making process?*

The general guide light in detecting codes and patterns, determining their coming-together as categories and themes, and the overall emerging understandings and interpretations, is the research question. Therefore, in all stages and steps of the coding journey, we need to be addressing the research question. In spotting individual points in data that are related to the question, this very relevance is the focus. Later when patterns emerge, we need to see if the patterns that we are marking are telling us—at least minor and scattered—things about the research question. When more solid (sub)themes start to appear, they should be increasingly providing understandings about what our research question addresses. So, at every step of the way, if we see that the process does move toward addressing the research question, then we can judge that we are on the right track.

- *What if little or no points related to our research question are found in the data? When no important codes are found and no patterns and categories are shaped, how can we make sense of our data and proceed with the research?*

The first consideration in such a case is that there may be problems with our coding ability. We may not have a deep enough understanding of aspects of the research question, we may be reading the data improperly, or our reading may be not sharp enough to link these two sides—that is, the research question and the data. A second possibility is that the data collection process was flawed. We collect data hoping that the contents of what we gather as our data bodies contain messages related to the

research question. If such related messages are not there, we should see if that hope and assumption was realized in our actual data collection practices. A third point to consider is that because of the nature of the question and the particular context of concern, it is natural not to find very frequent points related to the research question in every part of data. Issues related to our question can surface infrequently in the context under investigation. For the first possibility, improve the data analysis by deepening your theoretical and contextual understanding of the research concern, do more focused reading, and try to make subtler connections between the research question and the data. In case of the second type of problem, revisit the data collection process. For the third possibility, just be patient and, if needed, collect more data.

- *For coding audio-recorded data, can we listen and re-listen to data or do we have to transcribe data before coding can be carried out?*

Traditionally, when recording and replaying the recordings were technically burdensome tasks, there was enough justification for a one-time transcription of data for later multiple rounds of review and coding. Moreover, for beginner researchers, the very process of transcribing and later *seeing* the verbal data on paper or screen can be helpful in the challenging process of coding. However, with modern digital technology which makes it a piece of cake to replay certain parts of recorded data in no time at all, data transcription is not really a must. You can listen and re-listen and do the coding, marking, and annotation conveniently. Moreover, different software developed for computer-supported qualitative data analysis can even further facilitate this process. Basically, with the spread of digital technology and such specific software packages, we may need to re-conceptualize the issue of transcription in qualitative data analysis.

Further Reading

- **Auerbach, C. F., & Silverstein, L. B. (2003).** *Qualitative data: An introduction to coding and analysis*. **New York: New York University Press.**

Although this book tries to teach a wide spectrum of different aspects of qualitative research in general, it pays particular attention to data analysis and coding procedures as the heart of qualitative studies. Auerbach and Silverstein emphasize the hypothesis testing feature of mainstream social science research based on experimental approaches and statistical measures. Therefore, they highlight hypothesis generation and the exploratory nature of qualitative inquiry as its main distinctive feature. In the first three chapters, they cover some theoretical foundations of qualitative research, the distinctions from quantitative studies, and some aspects of designing qualitative studies. The major part of the rest of the book extensively deals with data analysis and different phases of coding. The authors explain the process of coding in different steps from early stages of encountering raw bodies of data, all the way to developing general understandings about the research issue.

- **Charmza, K. (2006).** *Constructing grounded theory: A practical guide through qualitative analysis*. **London: Sage.**

The grounded theory perspective shapes the main structure of the book, which presents different aspects of a qualitative research approach within this structure and based on this perspective. Charmaz states that her goal is to go back to the classic version of grounded theory and consider its evolution, and also to present it within the context of the current time. More specifically, offering methodological guidelines, addressing misunderstandings about grounded theory, and inviting beginner researchers to grounded theory are her main objectives in this book. The eight chapters of the book deal with the following themes: the background of grounded theory views; contextualized data collection based on such views; different types and phases of coding; writing early notes of a grounded theory research report; the issue of theoretical sampling in grounded theory research; interpretation and the concept of theory building; writing research reports; and reflecting on the overall process of inquiry.

- **Bazeley, P. (2013).** *Qualitative data analysis: Practical strategies*. **London: Sage.**

As the title suggests, Bazeley's book concentrates on the practicalities of qualitative data analysis through coding and categorization. The 13 chapters of the book are organized in four parts. Part one raises some basic issues with regard to qualitative ways of thinking about research and data analysis as well as planning and preparing bodies of data for manual or computer-supported exploration. The second part of the book presents extensive accounts of the actual steps of coding pieces of data and organizing them into groups and categories. In the third part, the author focuses on comparing and relating the categories and describing, understanding, and interpreting overall meanings. Finally, in part four, Bazeley discusses the concern of bringing the overall images of data together and providing coherent findings. She also writes about issues of the quality and transferability of findings that emerge from qualitative data analysis.

- **Saldana, J. (2013).** *The coding manual for qualitative researchers* **(2nd ed.). London: Sage.**

The six chapters and four appendices of the book provide a detailed practical guide on qualitative data analysis through coding. Chapter one covers the preliminary considerations about basic definitions and procedures of coding and their role in qualitative data analysis as well as the application of software in this regard and researcher roles and positions. The focus in chapter two is on researcher reflection and 'memo writing' during the process of coding. Chapter three, as the main part of the text, deals with specific first round coding methods and extensively illustrates various coding procedures. The next two chapters address what follows the first round of coding and discuss further more complex analytical processes. Finally, chapter six considers broader issues of organization, interpretation, presentation, etc. of research findings. Then, the appendices provide glossaries of 'coding methods' and 'analytic recommendations' as well as data samples for coding and some exercises and activities.

- **Thornberg, R., & Charmaz, K. (2014). Grounded theory and theoretical coding. In U. Flick (Ed.),** *The Sage handbook of qualitative data analysis* **(pp. 153–169). London: Sage.**

Thornberg and Charmaz start their chapter with some background information on grounded theory perspectives. They refer to the simultaneous process of data collection and analysis; the emphasis on people's conceptions of their own involvements; and the contribution of bits and pieces of data to the generation of overall theoretical understandings, as important features of a grounded theory approach. They also touch upon the notions of induction and abduction as crucial aspects of such an approach. After a discussion of the issue of theoretical sampling and the integrated processes of sampling, data collection, and analysis, the chapter turns to the details of different coding stages within a data analysis plan based on grounded theory. The chapter closes with a brief section on the concern over quality in grounded theory research, and the authors present a brief overview of some frameworks and sets of criteria in this regard.

- **Bryant, A. (2017).** *Grounded theory and grounded theorizing: Pragmatism in research practice***. New York: Oxford University Press.**

In the introductory chapter, Bryant provides a succinct but telling account of the purpose and contents of his book on 'grounded theory' as a broad method: "My intention in writing this book is to offer a series of chapters that deal with the background to the method, details of the techniques it encompasses, and some examples of how it has been used, drawing on the experiences of some of my successful and highly accomplished doctoral students who have used the method as part of their research." (p. xiii) The first two parts of the book (each including two chapters) address some broad considerations about research in general, and an overview of grounded theory. Before some further considerations in the three chapters of the final part, the author presents nine chapters in part three and elaborates on the actual process of data analysis and interpretation based on grounded theory perspectives.

- **Hadley, G. (2017).** *Grounded theory in applied linguistics research: A practical guide***. London: Routledge.**

The book comprises two parts, the first one on 'understanding' and the second one on 'doing' grounded theory research in applied linguistics, which, in the author's view, ranges "from TESOL, corpus linguistics, Second Language Acquisition, English for Academic Purposes (EAP), to the sociology of English language teaching" (p. 11). The first part deals with the emergence and philosophical bases of grounded theory in the landscape of social science qualitative research. On this basis, it also discusses different approaches and perspectives within grounded theory as an umbrella term, and how they can methodologically inform research today. In the second part, Hadley turns to the actual practice of research based on a grounded theory approach. He addresses different aspects of collecting interview and observation data as well as the details of the process of coding. Research ethics and the presentation of findings are also included in this part.

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Chapter 8
Data Analysis Beyond Coding

Coding procedures and the categorization of data segments are widely used as procedures of making sense of data in qualitative research in different fields. However, grounded theory perspectives and coding techniques are by no means agreed upon as the only way of qualitative data analysis or even the preferred means of data analysis among the relatively diverse traditions of qualitative inquiry referred to in Chap. 3. Some qualitative research traditions even basically distance themselves from coding and categorization and view data analysis as a fundamentally different process. This chapter is about these differences in perspectives, and other ways of data analysis that can open new horizons to beginner qualitative language education researchers as well as those who may view coding as the face of qualitative data analysis. Specifically, the chapter focuses on narrative analysis which might be viewed as an approach with considerable potentials to enrich qualitative inquiry in the area of language education.

Approaches to Data Analysis

Coding procedures have emerged from grounded theory perspectives and have evolved through decades as a way of making sense of qualitative data. They shape perhaps the most widely used way of qualitative data exploration today. Nonetheless, grounded-theory-based coding is not the only approach to qualitative data analysis, and perhaps not the *most qualitative* one. By some accounts, grounded theory and coding are even viewed as positivistic rather than constructivist and interpretive. The argument for such positions is based on the apparent reduction, fragmentation, and de-contextualization of bodies of data into segments. Despite the threats of reductionism and de-contextualization in the coding process referred to in the previous chapter, a standpoint that attaches grounded theory to positivism might be too harsh a position. Well-conducted coding that relies on grounded theory perspectives does actually provide good qualitative understandings.It is, however, true that *more*

qualitative approaches to making sense of data can be adopted. Coding procedures are applied to spot, extract, and categorize specific ideas related to the research question from all corners of the data landscape. These scattered ideas are expected to be rooted in the research context and, therefore, when they are put together in the form of thematic structures, they can uncover theoretical understandings that are embedded in the actual context. This is an approach clearly rooted in the context but not representing the actual extremely complicated, integrated, and fuzzy nature of human interactions. In qualitative data analysis literature, such an analytical approach is known to be based on *similarity* and *categorization*, but a more holistic, integrated, context dependent, fuzzy, and lifelike—and of course, more challenging—approach is also discussed, which is founded on understandings of *contiguity* and *integration* (Maxwell & Chmiel, 2014).

> Similarity-based relations involve resemblances or common features; their identification is based on comparison, which can be independent of time and place. In qualitative data analysis, similarities and differences are generally used to define categories and to group and compare data by category.
>
> Contiguity-based relations, in contrast, involve juxtaposition in time and space, the influence of one thing on another, or relations among parts of a text; their identification involves seeing actual connections between things, rather than similarities and differences. In qualitative data analysis, contiguity relationships are identified among data in an actual context (such as an interview transcript or observational field notes). (Maxwell & Chmiel, 2014, p. 22)

The application of similarity-based approaches and coding procedures in qualitative data analysis is a relatively less challenging process and can be helpful in analyzing large bodies of multiple data types. However, the empirical focus and the emphasis on codes, along with a partial reliance on the frequency of codes, sometimes move these approached to the vicinity of positivist research perspectives and practices. On the other hand, the context of research is accounted for with more complexity and richness in contiguity-based qualitative data analysis approaches. Therefore, data analysis is more embedded in the context based on such approaches. Moreover, the subjectivities of research participants are more seriously accounted for when contiguity-based data analysis is adopted. These very features naturally cause contiguity-based analysis of qualitative data to be a demanding process that can focus on a limited scope of research and small numbers of participants.

Narrative Analysis

A well-known data analysis approach shaped by the perspective of contiguity with a potential of wide application in language education research is *narrative analysis* (Bell, 2002; Pavlenko, 2002). The narrative analysis of qualitative data—sometimes also called narrative data—is based on people's integrated accounts of their experiences of events. As mentioned in the previous chapter, the conception of data analysis is fundamentally different in qualitative inquiry from the way this word is predominantly perceived in hard sciences and mainstream

quantitative research. From a narrative perspective, this contrast is even more evident. From such a perspective, the term *analysis* is perhaps a misnomer as narrative understandings are based on the integrated nature of contextually rooted and strongly personalized accounts. In pursuing narrative analysis, a crucial preliminary on the part of researchers is to fully detach themselves from sediments of quantitative mentalities of objectivity and generalizability. This preliminary requirement is crucial since narrative analysis is based on *stories*, and stories have long been delegitimized as unscientific—and, by implication, worthless knowledge—in the modern era.

Despite the modernist mentality, a considerable part of human learning in all ages, including in the modern period, has been based on experiences and memories. From each life experience you gain a memory, and memories—bitter or sweet—are stories you can learn from, you can remember, and you can tell. Therefore, experiences and stories (both personal and social) have bodies of knowledge embedded in them and narrative analysis means the attempt to recover these bodies of knowledge (Webster & Mertova, 2007). This *is* a potentially legitimate way of data analysis, as gaining one or another kind of understanding and knowledge is what research is about. Therefore, with a focus on contiguity in qualitative data, many bodies of data gained from participation and observation, different types of interviews, diaries and reflections, etc. may be fundamentally shaped by participants' stories and their extended accounts of affairs (Andrews, 2012). Recognizing, understanding, and interpreting these stories may be a profound way of contextual understanding of those data bodies.

By reminding ourselves that research is searching for knowledge and meaning, that lived stories are full of meaning and knowledge, and that our epistemological stance does seek contextual and lifelike rather than objective knowledge, what remains to be done is to try and make sense of stories and then to retell them in our own stories. Therefore, narrative analysis is basically making sense of accounts and stories reflected in data and retelling them in the language of researchers and with a focus on their research problem. In fact, theoretical awareness and knowledge, contextual understanding and situated view, and focused attention reflected in research questions, along with the focused reading of the words and worlds of participants reflected in qualitative data, are the main companions of researchers in doing narrative analysis (Squire, Andrews, & Tamboukou, 2008).

> *Narrative analysis in any field of inquiry (like psychology, sociology, and nursing) is naturally aimed at look for meanings related to specific disciplinary concerns. In language education research, narrative data analysis has been applied to address different deeply rooted concerns about specific issues of language teaching and learning that can barely be touched by experimental studies.*

(continued)

In a special issue of TESOL Quarterly on Narrative Research, Johnson and Golombek (2011) *discussed the application of narratives in teacher inquiry as a way to foster professional development in second language teacher education. Focusing on the position of narratives in inquiry processes, they argued that relying on "narrative as a tool for knowledge-building" (p. 502) can transform the landscape of teacher education in the field.*

In the same special issue, Nelson (2011) *argued that narrative studies can enrich language education research by providing significant potentials for exploring 'narratives of classroom life'.*

Highlighting other potentials of narrative inquiry, Rugen (2013) *discusses how understanding narratives can be a way to investigate identities of language teachers and learners. Examining the narratives of a pre-service teacher in a program of English language teacher education in Japan, the study illustrates the methodological aspects of narrative research in addressing identities in language education.*

As exemplified by these research topics, certain research problems may be more inviting for narrative analysis. Moreover, such topics may need from the beginning to be conceptualized in a way that can be later more conveniently addressed by such an analytical approach. More importantly, when the problem and the specific research question are constructed with a prospect of narrative analysis, the data collection process should proceed in a manner that provides narrative data. In other words, the data collection procedure and how it is actualized need to be concerned with noticing, eliciting, and recording participants' lived stories. Obviously, *storyless* data cannot be examined through narrative analysis and in terms of integrated elements of a story. Perhaps narrative data can be most easily gained though narrative interviews but stories can also be gathered through observation and other data collection procedures.

Looking for Stories

As discussed in the previous chapter, analysis as the process of making sense and seeking meaning inevitably starts from the beginning of your data collection process. Therefore, in the first minute of your observation, the first interactions in your interview, or the first page of teacher diaries that shape your data, you may notice that stories—or at least partial stories—are there. Even if you do not want to apply narrative analysis as your analytical procedure, if you are collecting good qualitative data, narratives are essentially there. Therefore, in narrative analysis, the

problem is not much about their existence but more about recognizing them as a legitimate medium of analyzing the data. Just keep reminding yourself—especially if your background or subconscious attitude is inclined toward experimental research—that stories contain knowledge and meaning, and understanding stories *is* viable research.

We may also need to be reminded that the guide in the actual doing of narrative analysis is the research question. Like the case of coding—and any other way of making sense of data—you need to have an idea of what you want to know, and this is reflected in your research question. Therefore, in dealing with the data in narrative analysis, when you encounter an ocean of stories, the criterion for their relevance and meaningfulness is the research question. One further reminder is for those who are well into qualitative research but have so far been seeing qualitative data analysis only from the perspective of similarities, coding, and categorization. In narrative analysis we are not primarily looking for patterns of repetitions but even a single instance of a participant's account of an event or experience can be a source of insight and learning.

Having mentally set out from these preliminaries, what you practically need to do is to view and review your data bodies, and re-view them again and again. Just see what coherent accounts are there that you can make sense of. In your search for stories, do *not* look for neatly integrated classic plots comprising introduction, conflict, raising action, climax, falling action, and resolution. In what people say and what they do, they live stories but do not compose stories in the sense of literary works. More specifically, when your bulk of data is about issues in language learning and teaching, you can rarely expect stories in the sense of literary pieces or even folklore tales. However, in your research participants' language-education-life which is reflected in your data, there are people, places, times, acts, feelings, attitudes, challenges, problems, solutions, etc., some of which can come together in the form of coherent accounts of affairs from the perspective of the participants. Look for those coherent accounts and see what they mean to *you* as a theoretically informed, contextually aware, and analytically focused reader. If these stories mean something to you, they probably mean something to others and to the field of language education. Just re-tell them. In doing this—possibly in the Findings and Discussion section of your thesis, paper, or report—you can refer to the elements of the theoretical background and the contextual clues that you employed in making sense of them.

> *In an article discussing resistance against ideologies of the English language by young Indian boys living in an orphanage near New Delhi,* Bhattacharya (2017) *scrutinizes the 'storying' elements embedded in anecdotes narrated by these young boys. The research reported in this article is part of a larger study with different types of data, including participant observation, fieldnotes, video recording, interviews, written artifacts, and reading materials.*

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However, the specific focus of this article is on two simple humorous folk-type anecdotes as told by two children about learning and knowing English by local people in the rural area where they lived. The details of the two anecdotes are analyzed in search of understandings about ideologies of resistance against English in the cultural context of the life of these children. The researcher's understanding of these narratives heavily relies on her personal understandings deeply connected to this particular social context.

Anecdote 1: A boy was sent abroad to learn English. When he returned, he forgot Hindi and no one understood him. Then, when it was meal time, rice got stuck in his throat and he asked for water in English but no one understood. He ran to his friends but he died before he could ask for help.

Anecdote 2: A man came from the direction of America. He went with some local men who were rowing a boat and his feet got stuck in a swamp but a local man saved him. He thanked him in English but the local man threw him back into the swamp, picked him up again, and threw him again. The man finally drowned.

In analyzing the anecdotes, the researcher focuses on different features narrated by the participants in telling the stories. For example, she argues that the construction of both anecdotes ascribes the English language to foreigners as strangers. This is reflected in the boy's language learning 'abroad' in the first story and the man coming from a certain 'direction' in the second one.

Another aspect of the ideological attitudes associated with English reflected in these stories is said to be the acquisition of alien cultural orientations and the loss of local ones: in the first story, no one can understand the boy and he is no longer able to eat local food. The association of English language learning with different kinds of 'mobility' and the disastrous fates of speakers of English are other aspects of the plots reflected in the anecdotes.

The researcher argues that the narrative structure of the anecdotes portrays dark images, fears, and resistance regarding the English language in the specific sociocultural context of concern. The colonial history of English, its association with alien cultures, the fear of the replacement of local traditions with practices associated with English, and the association of English with the elite class in modern India away from the access of the children participating in the study are some underlying conceptions reflected in these simple and not much profound-sounding tales.

This is an instance of simple and overtly told story-like narrations rather than complex narrations embedded in complex bodies of data. However, the researcher's points of focus in these stories and the types of her interpretations can illustrate the nature of analyses and understandings in narrative analysis. More complicated narratives may invite more intricate analyses of the details and subtle aspects of form and meaning in stories.

A crucial aspect of narrative analysis is to detect bits and pieces of people's accounts of affairs and to construct—this does not mean to fabricate—their stories. In many cases, the real understanding lies in a grand story the elements of which can be scattered in a landscape of large bodies of different types of data that have been collected over a long period of time and in different places. Sometimes, the overarching story is composed of several mini-stories found in different parts of data. More subtly, important parts of the grand story of a participant can sometimes lie in the acts and words of people other than that particular participant. Finally, do remember—although it goes without saying—that stories that you explore in narrative analysis are not always about individuals. In fact, many narratives in social science research, including language education research, are shared stories of groups—and sometimes large groups—of people.

"We are surrounded by stories and construct stories as we make sense of the events we live and witness. Our stories are often embedded in other stories, which are themselves embedded or linked to other stories." (Freeman, 2017, p. 32). Therefore, Freeman suggests that in narrative thinking about qualitative data we "connect disparate events into coherent accounts" and connect unique "individual experiences to universal human themes" (p. 41). By recognizing the uniqueness of the accounts by language learners, teachers, and other participants in the diverse research contexts related to language teaching and learning, and by connecting such uniqueness to the wider themes of language education, narrative analysis of our qualitative data can help us gain precious insight and "exemplary knowledge" (Thomas, 2011, p. 30) that reaches far beyond individuals or small communities to the farthest corners of the world of language education.

Tsui (2007) *investigated the issue of language teacher identity construction in a Chinese context based on a narrative inquiry. The study focused on exploring and understanding narrative accounts by Minfang (an English language teacher) about his identity construction challenges. His extensive narrative was recorded by the researcher over a period of six months through "face-to-face storytelling", "reflective diaries which he wrote for himself" but also shared with the researcher who responded to and reflected on them, and "intensive face-to-face conversations [with the researcher] over a period of one week during which Minfang relived the stories that he had told" (p. 659).*

Tsui carried out the data analysis in three stages of the chronological sorting of stories from the participant's childhood memories as a learner to his later stories as a teacher; highlighting the 'identity conflicts' in his stories as an English language learner and teacher and focusing on the links among these conflicts; and the detailed examination of process of meaning making and identity formation based on a particular theoretical framework, which specifically examined the "forms and sources of reification, participation and nonparticipation in reification, negotiability and nonnegotiability of meanings, and participation and nonparticipation in the negotiation of meanings" (p. 659).

Issues in Narrative Analysis

In conceptualizing and conducting narrative analysis of qualitative data in language education research, along with the process sketched above, there are a few issues to consider. These considerations are about conceptions of stories embedded in narrative data, the subtleties of detecting and depicting these stories, and threats to the process of narrative analysis in qualitative language education research.

- What we mean by story is not necessarily a neatly planned anecdote shaped by a full plot with all its elements discussed in literary traditions, but meaningful and coherent accounts of experiences (Bamberg, 2012; Georgakopoulou, 2015).
- Stories are scattered in our bodies of data and it is the narrative analyst's job to find and put them together in the construction of a coherent whole.
- Narrative analysis is not all about constructing stories in our minds or simply re-telling them. We need to see what they mean to us about our research question and to express our understanding of those meanings.
- Stories that can address our research questions about certain individuals and groups do not necessarily exist in what they say or do, themselves. We may find relevant understandings in the stories of others.
- Given the nature of constructing, in-depth understanding, and expressing what we see in the process of narrative analysis, the number of people, settings, and events that can be focused on is limited. The understanding that is gained may be extended to others with a consideration of their peculiarities.
- Like other ways of dealing with qualitative data, in doing narrative analysis, we need to remember that stories are subjective constructions. This is important in understanding them in the participants' own context of individual and social life.
- Because of the very subjective and constructed nature of stories, you always need to beware of misunderstanding stories as well as the possibility of false stories that participants may narrate for many reasons.
- The notion of context is significant in qualitative research but in narrative analysis it is vital, in the sense that one can gain almost no meaningful understanding of stories if they are not interpreted by considering the contextual complexities of how they are narrated.

Arts-Based, Critical, and Other Approaches

So far, in the previous chapter and the current one, grounded-theory-based coding and narrative analysis have been discussed as the realizations of the similarity-based and contiguity-based approaches to qualitative data analysis. However, analytical approaches to qualitative data are not limited to these two. There are

other approaches that may be variably perceived as independent ways of analyzing qualitative data, or at least other ways of thinking about such data that can be adopted along with coding techniques and narrative analysis procedures. An extended discussion of the details of these alternative approaches is beyond the scope of this introductory book but a brief sketch can be helpful—even for the beginners—in providing an idea of the depth and breadth of what is called qualitative research.

Arts-Based Analysis

Based on the constructivist and interpretive epistemological perspective underlying qualitative inquiry, the diversity of knowledge and understandings is valued. Therefore, knowledge in its broad sense, which is the outcome of the research process, can include artistic understandings as well. Therefore, in the process of sense-making in dealing with qualitative data, an artistic point of view can be adopted—based on visual arts, performance arts, poetry, etc. (Saldana, 2011). In qualitative data analysis, in addition to the possibility of a relatively structured process of coding and categorization, and a more fluid process of narrative analysis, the qualitative researcher may closely examine the data through the eyes of an artist. The artistic way of thinking about qualitative data aims "to reveal experience as it is experienced, not as it is thought. It requires a deep attentiveness or attunement to the experience of being in the world in all its mundane but complex everydayness" (Freeman, 2017, p. 75).

In practice, the very attempt at understanding stories in the process of narrative analysis has an artistic aspect to it. Extending this artistic aspect and providing a more relaxed space for feeling, interpreting, and appreciating new understandings and emotions, on the one hand, and recognizing more diverse way of expressing and representing such understandings, on the other, shape the act of arts-based thinking about data analysis. In Freeman's words, the aesthetic way of thinking about qualitative data, which is put into practice through arts-based data analysis and artistic ways of presentation and expression, "provides a significant contribution to human research. It does this by creating a collaborative, performative space where researchers, participants, and audiences can make sense of lived life together" (Freeman, 2017, p. 83).

Albers, Harste, and Holbrook (2017) *write as literacy researchers who are also deeply involved in visual arts. They believe that despite the shifts from traditional literacy teaching to multiple literacies perspectives that can include artistic understandings in addition to language forms, literacy research is not keeping pace with arts-based research perspectives.*

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More specifically, as they argue: "Methods of analysis – even those considered qualitative – often tack toward the quantitative and in the process lose nuance and depth. Furthermore, we sense a lack of joy and pleasure in much of the analytical methods we read about in academic journals and, admittedly, sometimes practice ourselves." (p. 171)

In presenting an instance of artistic analysis in qualitative inquiry, they illustrate the process of poetically based qualitative data analysis. They focus on reading data in search of imaginative and metaphoric notions that can be understood and stated in 'poem-like' ways of expression.

They explore data transcripts based on their autobiographic discussions and interviews through a process called 'poetic distillation' and move from the significant notions in the text of their data to a more abstract level of poetic statements and, then, to a third level of expressing their key discoveries in the form of poems expressing their understandings.

One important aspect of such an analytical approach is to understand the imaginative depth of data, and a further aspect is being able to say more about understandings and findings in fewer words more eloquently.

Critical Analysis

In categorical analysis, narrative analysis, and arts-based analysis of qualitative data, the analytic focus is on gaining understandings and insights about the issues reflected in the research question. Based on the general perspective of qualitative inquiry, these analytic approaches are concerned with understanding research issues within the complexities of specific social contexts. In collecting and analyzing data based on such approaches, the subjectivities and perspectives of the participants are essentially part of understandings and interpretations. The consideration of ethical concerns, respecting the research participants and community, and avoiding harmful behavior toward the society are also important in all parts of the process of qualitative research, including data analysis. Moreover, a broad—though sometimes vague—intention of benefiting the community of concern, academic fields of inquiry, and the broader society are always part of qualitative research endeavors. However, pursuing the actual contribution of research findings to the society is not an overt part of the research endeavor and obviously not an aspect of the data analysis process.

In critical research approaches, the broad aim of social transformation is part of the essence of research (Bhavnani, Chua, & Collins, 2014; Kress, 2011). This broad orientation not only directs the application of the research outcome but is more specifically argued to influence the process of making sense in examining the data. In Freeman's words, this mode of thinking about qualitative data analysis is oriented toward social change and transformative action by challenging "the objectification

and essentialism associated with categorical thinking as well as the intentional and uniform view of the actor often portrayed in narrative thinking" (Freeman, 2017, p. 46). The practice of data analysis based on a critical approach may be in line with contiguity-based analytic approaches and similar to narrative analysis, but the distinctive characteristics of such a practice can lie in the nature of narrative accounts and how they are conceptualized with a concern for power relations.

It might be argued that the critical and artistic approaches are not technically distinct procedures of data analysis but only broad perspectives and worldviews. They are ways of understanding categories and stories rather than data analysis procedures to be applied without relying on any kind of categorization and any reference to the narrative structures and embedded stories in data. Therefore, these alternative approaches to qualitative data analysis may be most meaningfully applied along with some kind of categorization and/or narrative analysis. More fundamentally, the similarity-based and contiguity-based analytical approaches are not mutually exclusive. You may be able to apply them hand in hand to gain more in-depth contextualized understanding of your data; categories explained by stories, stories explicated by patterns and categories, and both categories and stories enriched by artistic and/or critical thought.

Other Analytical Approaches

Freeman (2017) discusses five specific ways of examining and exploring qualitative data as different 'modes of thinking': categorical thinking based on codes and grouping them together, narrative thinking based on understanding stories, artistic thinking, critical thinking, and diagrammatic thinking. However, not all qualitative traditions may conveniently fit into one of these modes when they approach data analysis. These different traditions—which may also be called schools or genres of qualitative inquiry—show considerable overlap in their epistemological positions. Their views on the nature of evidence that can be applied in research may also largely converge, and they can rely on more or less similar sources of data. However, perhaps the most important characterisitc that distinguishes these different traditions is their encounter with their research evidence and how they go about analyzing and understanding qualitative data.

It may be difficult to convince those who identify themselves with qualitative traditions like phenomenology and ethnomethodology to submit to the idea that their analytical approaches fall somewhere among the five modes of thinking about qualitative data discussed by Freeman (2017). They may somehow defy all notions of categorization, storying, artistic analysis, criticality, and diagrammatic thinking. However, within the broader categorization of similarity-based and contiguity-based data analysis approaches proposed by Maxwell and Chmiel (2014), most traditions can be seen as relying on some kind of examining the interconnected ideas embedded in data. Within this approach, they interpret and make sense of these connections based on their own philosophical standpoint. Therefore, it might be

argued that, in a sense, the major traditions of qualitative research may present their own data analysis approach somewhere within the vast landscape of contiguity-based approaches to qualitative data analysis.

Computer-Supported Data Analysis

The ubiquitous influence of digital technology on all sides of life today and the presence of different shapes of computers almost everywhere hardly requires any emphasis. Academic research is no exception in embracing and being embraced by computers. Quantitative experimental studies are already fully influenced by digital technology not only by facilitating distant accessing, the storage of huge amounts of data, and data management, but significantly through the all-important role of computers in statistical data analysis. Today no serious quantitative research is conducted without the application of a software package of statistical analysis. The application of all types of mathematical formulae in the process of hypothesis testing through comparing various sets of scores and different types of variance is carried out in the digital brains of computers. Therefore, in quantitative research, data analysis as the most significant technical aspect of a research project is carried out by computers, and all experimental research in all fields of inquiry is computer-supported today.

In qualitative research, too, computers are now indispensable but in different ways (Costa, Reis, Sousa, Moreira, & Lamad, 2017; Costa, Reis, & Moreira, 2019, 2020). Many aspects of the application of computer technology in qualitative inquiry are the general facilitations provided by computers in other types of research, other kinds of scholarly activities, and, generally, other aspects of modern life. These uses of computers permeate almost all aspects of qualitative research procedures. The general applications of computers in qualitative research can be of several different categories: recording various types of data—including audio, visual, and multimodal data—in very large amounts with little effort and cost; accessing different types of data from long distances via computer networks; sorting, organizing, storing, searching, and retrieving huge amounts of various kinds of data; making notes, writing memos, and editing textual data with ease and speed; transcribing audio recordings and converting and/or linking bodies of data to other data types; and collaborating and sharing with co-researchers, colleagues, supervisors, etc.

In addition to these diverse applications of computers, however, Flick (2009, p. 360) does note that "most of the software and computers in qualitative research are used for analyzing data." Silver and Lewins (2014) also mention the applications of computers in helping with the theoretical aspect of reading and reviewing the literature (which can be part of other research approaches and other non-research activities, as well), and facilitating the collection and storage of qualitative data. However, in their view as well, computers can more specifically contribute to data analysis in qualitative studies: "The analysis of qualitative data is central to the support offered by computer developments in terms of providing the means of handling

and integrating data, recording ideas about them, and interrogating materials in ways that for some media might not be achievable "manually" or outside the package." (p. 610)

The so-called qualitative data analysis software packages started to emerge in the 1980s (Kele, 2004; Silver & Lewins, 2014) but, by some accounts, their application "in academia has only taken off since 2000" (Gibbs, 2014, p. 278). "Now, quite a range of software programs is available, mostly focused on the area of qualitative data analysis" (Flick, 2009, p. 359). However, before you decide to select and practically use a software package in analyzing data in your qualitative research project, there is an important concern you should seriously consider. Unlike statistical analyses in the form of mathematical calculations that happen in a computer's *brain*, the act of qualitative data analysis, that is, making sense of qualitative data, happens in the mind of the qualitative researcher. If we take data analysis in qualitative studies to mean sense-making, then using the word *analysis* for what computers do with qualitative data is a misnomer.

The software packages of statistical analysis apply the formulae, do the comparisons, and determine the statistical (in)significances. Therefore, they do a considerable part of the sense-making process in dealing with statistical data bodies and make them ready for higher order interpretations. In contrast, software packages prepared for dealing with qualitative data provide tools of managing, organizing, and handling qualitative data with the purpose of facilitating the sense-making process. The packages do not carry out data analysis in the sense of computer programs used in quantitative studies. In qualitative data analysis, all decisions about determining the details of handling data pieces are made by the researcher, and the machine is only a tool used to mark, record, link, edit, and display data. The novelty of qualitative data analysis software packages is in providing a coherent and technically facilitative mix of multiple computer tools adjusted to what can be needed in qualitative data analysis: word processors, portable document file readers, image displayers, audio and video players, and various tools of marking, highlighting, and tagging, along with different means of displaying and presenting the findings on the screen.

In this section, I am not going to be much helpful in providing guidance on the practical application of computers in qualitative data analysis. Commercial software packages are not to be named here and, even if they were, the detailed practical and illustrative instructions on how to apply such packages are what you should find in their manuals. The existing software are not fundamentally different but may have differences in details. In selecting a specific software package to use, beyond availability and price as important practical issues, Flick (2009) suggests a few items to be considered in comparing computer programs for qualitative data analysis: the kind of data they can and cannot handle; the kind of activities they can and cannot do with data; the required hardware to run the software; and the required skill on the part of the user. "The best advice when starting with new software is to spend a bit of time 'playing' with it using some real data; be prepared to throw everything away and start over again" (Gibbs, 2014, p. 281). So, read the manual, possibly take part

in some training sessions or workshops, and allow some time for trials and errors before you are a competent user.

A final note is that the existing software packages are mainly designed to facilitate similarity-based types of coding and categorization rather than narrative or other types of qualitative data analysis (Niedbalski & Slezak, 2017). (See the section on "Approaches to Data Analysis" early in this chapter.) They provide "a common core of functions to support the thematic coding of data and for the comparison of themes across cases. Thus, these programs provide good support for analytic approaches that use these ideas, such as grounded theory" (Gibbs, 2014, p, 279). They may be very helpful in coding huge amounts of data when you have to categorize very large numbers of codes. However, the application of computers—and the *support* they can provide—may appear to be little more than audio/video players and word processors when it comes to contiguity-based qualitative data analysis. Stay cautioned that important concerns have also been raised about qualitative data analysis computer programs: too much emphasis on coding; failure to provide conceptual support in data analysis; distancing the researcher from the actual feel of data; and overshadowing the epistemological and methodological aspects of qualitative research (Silver & Lewins, 2014). So, do remain aware of your epistemological and methodological understandings of qualitative research in the hustle and bustle of the technicalities of computer-supported data analysis.

Questions

- *Narrative analysis and other contiguity-based analytical approaches are very much specific and less generalizable even compared with grounded theory analysis. How can they contribute to our understanding of our research issues in wider settings?*

As mentioned at different points in this book, the concept of generalizability in the sense that is common in quantitative studies is neither possible nor desirable in qualitative research. However, this does not mean that the knowledge and understandings gained in qualitative studies cannot be transferred beyond the specific context of a study. A profound understanding of a phenomenon in a specific context is by no means less valuable than a rudimental examination of a large number of phenomena just in terms of a few variables. Narrative, artistic, critical, phenomenological, ethnomethodological, and discursive types of analysis that focus even on a single person or setting can create understandings and wisdom that can be transferred to a diversity of other contexts and people.

- *In narrative analysis, are we just telling the participants' stories? What is the important job that the researcher does in dealing with stories?*

In raw narrative data, participants' stories are embedded in their accounts of various events and experiences in the way they perceive and narrate them. Even if the task of the researcher is merely noticing, extracting, and stating the same stories, it is a

worthwhile endeavor. However, what the researcher does in the process of narrative analysis goes beyond the mere telling of those stories. Narrative analysis should include the re-construction, interpretation, and *re-telling* the stories in relation to the research question. In a sense, the raw data contains the participants' stories but after the process of analysis, what is presented is the researcher's story. Moreover, the process of narrative analysis sometimes goes as far as scrutinizing the symbolic features, semiotic and rhetorical properties, and even linguistic elements of the narrative data in order to interpret them in relation to the research question and within the context of a particular study.

- *Do we trust participants' narrative accounts as taken-for-granted real reflections of reality and honest mirrors of their inner worlds?*

Like the case of almost all types of qualitative data, narrative data are discursive constructions shaped within the complexities of life experiences and constructed in the research context. Therefore, confusions, misunderstandings, misrepresentations, and even outright lies can be expected to be part of the construction of narrative accounts. Therefore, like almost all ways of exploring qualitative data, narrative analysis does not imply taking the data and the participants' stories for granted. Keeping some kind of distance with the data, de-familiarizing the participant's accounts of events and experiences, and even a certain extent of suspicion about the participants' consciousness, honesty, and expression ability should be part of the qualitative researcher's involvement during the process of narrative analysis.

- *Are language-based approaches like discourse analysis and conversation analysis considered as qualitative approaches of data analysis?*

The specific approach of conversation analysis is clearly part of the landscape of qualitative research and is associated with *ethnomethodology* (ten Have, 2004). It has been fairly well received by researchers in the area of applied linguistics and language education because of its conceptual and procedural proximity to linguistic analysis. As for discourse analysis approaches, it may be argued that they can be understood as qualitative research approaches but a more specific judgment is contingent upon the particular conceptions of the notion of discourse as well as analysis. At one extreme, discourse analysis may refer to the linguistic description of long stretches of language at the level of sentence, paragraph, and text. This can hardly be viewed as qualitative analysis. Further along the continuum, there are approaches that aim at the contextual understanding of oral or written bodies of language. The social situated nature of language, rhetorical structures, and the construction of meaning are crucial aspects of such approaches, which can be understood as qualitative. Such qualitative analysis may shape a mode of analysis of its own, outside the realm of the five modes of qualitative data analysis proposed by Freeman (2017). At the other extreme of the continuum, there are necessarily critical approaches to discourse analysis which are clearly qualitative in nature (Wodak & Meyer, 2009). The conception of discourse and the notion of analysis in such approaches are congruent with constructivist epistemological positions and their critical attitude can place them within Freeman's dialectical mode of thinking about qualitative data analysis.

Further Reading

- **Webster, L., & Mertova, P. (2007).** *Using narrative inquiry as a research method: An introduction to using critical event narrative analysis in research on learning and teaching*. London: Routledge.

The book introduces narrative as an approach that has been often viewed as a way of data collection rather than a general research methodology. The authors aim to explicate such a methodological conception for both novice and experienced researchers. A chapter is devoted to the philosophical foundations and theoretical origins of narrative inquiry. Then, in an independent chapter, Webster and Mertova provide examples of narrative studies. They present elaborate accounts of nine stories that illustrate the application of narratives in various fields of inquiry. An important chapter of the book is about the 'critical events approach' in narrative research. It "proposes that narrative can be analysed through the highlighting and capturing of critical events contained in stories of experience" (p. 71). Concerns over trustworthy narrative studies are also addressed and a specific framework for conducting such research is presented to tackle the difficult practical aspect of narrative research.

- **Andrews, M., Squire, C., & Tamboukou, M. (Eds.). (2008).** *Doing narrative research*. London: Sage.

The contributions to this edited collection address various aspects of the theory and practice of narrative research. In their introductory chapter, the editors provide broad accounts of the conception of narrative as well as the origins and different paths of developments of narrative approaches to inquiry. The eight chapters of the volume, then, elaborate on several themes: a detailed account of the narrative research approach of William Labov along with a critical appraisal; viewing narratives as re-constructed accounts of experiences rather than factual accounts of events; understanding the role of context in exploring and interpreting narratives; the dialogic view of narratives and the co-construction of narrative accounts; the centrality of data and interpretations of such data in narrative inquiry; a discursive view of narrative studies based on Foucauldian discourse perspectives; narrative studies of the so-called sensitive topics; and the ethical and sociopolitical concerns surrounding narrative research.

- **Barkhuizen, G. (Ed.). (2013).** *Narrative research in applied linguistics*. Cambridge: Cambridge University Press.

Barkhuizen's edited volume focuses on narrative inquiry in applied linguistics and language education. In the introductory chapter, he deals with some general epistemological and methodological considerations about narrative research but, from the outset, he highlights the difficulty of defining it: "Narrative and narrative research are notoriously hard to define." (p. 2) In discussing the methodology, Barkhuizen specifically raises the dichotomy of 'categorizing' as distinct from 'storying' in shaping an analytical approach. The book comprises four parts. The chapters in the first part focus on the content of narratives in light of contextual understandings of narratives. The common feature among the chapters in the second part is the content–form relation in narrative research in the field. The third part highlights the

constructed nature of narratives as social practices. Finally, the chapters in the last part of the book more specifically focus on the analysis of narratives and the presentation of analyses.

- **Barkhuizen, G., Benson, P., & Chik, A. (2014).** *Narrative inquiry in language teaching and learning research***. London: Routledge.**

Observing that narrative research is a well-developed enterprise in fields like psychology and sociology, the authors argue that in language education research, too, narrative inquiry has reached a state that can be recognized as an important research approach. "The aim of this book is to offer advice on data collection and analysis to researchers who are interested in experimenting with narrative research. In this respect, this is a conventional "research manual"." (p. xii) In illustrating the practical hints expected from a manual, the authors rely on tens of published narrative studies of language teaching and learning. Apart from independent chapters on collecting oral, written, and multimodal narrative data, two chapters are devoted to data analysis in narrative studies and reporting such studies. In the chapter on analysis, the thematic analysis of narrative cases, analyzing the discourse of narrative data, and the quality of narrative studies are discussed.

- **Flick, U. (Ed.). (2014).** *The Sage handbook of qualitative data analysis***. London: Sage.**

Flick's edited volume is a collection of 40 chapters on various theoretical and practical aspects of qualitative data analysis. The first part of the book comprises a single introductory chapter to the volume. The rest of the chapters are organized in four parts. Part two is about a number of basic considerations, centrally including a chapter on shaping a 'theory' of qualitative data analysis. The third part covers qualitative data analysis in different research traditions such as grounded theory, phenomenology, and narrative inquiry. Chapters in part four deal with various types of qualitative data (interviews, focus group interviews, observation data, multimodal data, etc.) and different analytical approaches (like conversation analysis and discourse analysis). Finally, part five addresses various other issues in qualitative data analysis, including data re-analysis, qualitative meta-analysis, the quality of data analysis, ethical issues, mixed and multiple methods, generalization, and theory development.

- **De Fina, A., & Georgakopoulou, A. (Eds.). (2015).** *The handbook of narrative analysis***. Malden, MA: Blackwell.**

The chapters in this volume cover a wide range of issues regarding narrative analysis. In their introductory chapter, the editors present the rationale for such a book and then touch upon the possible move from the narrative analysis of texts toward narrative understandings of 'social practices', before they provide an overview of the volume. They propose a number of questions reflecting the central concerns of the book: "How do we organize and make sense of our experience with stories? What is the role of narrative in the understanding of self over time? How are stories shaped by culture and by norms of socialization into communicative practices?" (p. 6). The five main parts of the book address some fundamental theoretical

considerations; the structure and organization of stories; the nature of interactions in narrative accounts; the role of narratives in social practices; and identities and positions in narratives.

- **Freeman, M. (2017).** *Modes of thinking for qualitative data analysis*. **London: Routledge.**

This book is intended to fill a perceived gap of authoritative works on teaching qualitative data analysis from an interdisciplinary perspective. Therefore, Freeman's overall orientation is to provide broad perspectives that can shape different understandings of qualitative data and general approaches (modes) of thinking about and making sense of qualitative data. The book does not provide guides on the practical phases and steps of data analysis but aims to provide profound insights about the theoretical bases of these practicalities. "More specifically, it is a book about thinking about modes of qualitative data analysis as strategies that take on particular orientations depending on the theoretical perspective(s) guiding it." (p. xiii) Five 'modes of thinking' are considered: thinking about data in terms of categories and grouping of findings; understanding the narrative meanings of qualitative data; dialectical and critical thinking; artistic and poetical understating; and examining data in search of diagrammatic relations.

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Chapter 9
The Quality of Qualitative Research

Qualitative research is not concerned with issues of objectivity and generalizability. Not only that, the epistemological bases of qualitative inquiry necessitate purposefully staying distant from criteria of scientific rigor and traditional conceptions and measures of reliability as they encompass assumptions of positivism. To outsiders and newcomers to qualitative traditions, this might be interpreted as a lack of attention to the quality and strength of the research process and products. The image that follows is that in qualitative studies there is no concept of good/bad, better/worse, or strong/weak researching; you can do whatever you like in whatever way you wish in qualitative projects; and with all aspects of qualitative inquiry, *anything goes*. However, this is simply not true. Qualitative studies can stand somewhere between the two extremes of excellent and strong, on the one hand, and shabby, weak, and very bad, on the other. The conceptualization of good and bad qualitative research is obviously based on constructivist and interpretive epistemological standpoints. Aspects of these conceptualizations and their actual consideration in the process of research are discussed in this chapter. It should be recognized, however, that this chapter is not about just the *next step* in qualitative studies. The ideas reflected in this chapter need to be part of the spirit of inquiry in qualitative language education research.

Approaches to Research Quality

In thinking about the quality of qualitative research, the overall concern is with *good* inquiry practice that is shaped by taking the right research path, making good decisions about aspects of data collection and analysis, making logical inferences and interpretations, and gaining meaningful insight and knowledge. In addressing these concerns, apart from the detailed practicalities of dealing with settings, equipment, participants, eliciting and recording data, analyzing data, etc., the major challenge is how the agency of the researcher acts upon the research process. In other words,

with all the emphasis of qualitative research on embracing and valuing the subjectivity of the researcher and the participants, and the contextual construction of almost all aspects of research, can we expect to gain meaningful knowledge?

How can we make sure that the outcome of an all-subjective process is valuable and relevant understandings and not a collection of actions and words reflecting people's *whims*? (Flick, 2007a; Steinke, 2004) This concern can be addressed from three perspectives: a perspective of relying on bluntly positivist measures of rigorous scientific knowledge in evaluating research; a perspective of adopting apparently constructivist—but perhaps with underlying positivist—criteria of quality; and an alternative perspective of quality congruent with the essence of the epistemological foundations of qualitative research. These perspectives are discussed in the following sections.

Positivism Continued

One approach to quality in qualitative research is to simply carry positivist mentalities into the qualitative realm. Odd as it may seem for those within the epistemological atmosphere of qualitative inquiry, this is the commonsense of many newcomers to qualitative research. This is not an approach deserving much discussion but it does require at least a reminder, as I have frequently seen this evaluative approach resurface in what student qualitative researchers say about their research. The lingering positivist conception of quality means simply applying measures of quantitative experimental research to qualitative inquiry. Based on the sediments of positivist conceptions of scientific research standards, questions about the quality of research can focus on objectivity, reliability, and generalizability (Cho & Trent, 2014; Seale, 2003, 2011; Tracy, 2020).

Questions that may be asked are whether one can guarantee that the research process and its outcomes are objective enough and *unbiased*; whether it is possible to make sure that the research process is consistent, reliable, and replicable; and whether the research findings can be generalized to other places and people beyond the specific setting of each project. In addressing such questions, rather than trying to legitimize qualitative research by arguing that qualitative studies do meet these requirements *in a way*, the response is a simple *no*. Qualitative research is *not* unbiased, replicable, and generalizable. It is inspiring here to see Teun van Dijk's response to similar questions about bias in critical discourse analysis (CDA). He sharply states that "CDA is biased – and proud of it" (2001, p. 96). For ourselves as qualitative researchers, we need to be thinking of reminders that conceptions of objectivity, reliability, and generalizability belong to a different epistemology and cannot be applied to qualitative research (see Chap. 1).

Seeking Trustworthiness

Continued adherence to positivist standards and measures of research rigor may be part of an attitude of rejection or suspicion in early encounter with qualitative research in academic and institutional contexts dominated by quantitative traditions. Moreover, newcomers into the realm of qualitative inquiry with theoretical and/or practical background in experimental research may need some time to distance themselves from mentalities of exactness and objectivity in their attempts at qualitative research. However, after gaining basic familiarity with qualitative perspectives—without a necessarily negative attitude, of course—it is not difficult to recognize that the process and outcome of research in qualitative approaches cannot simply be judged by the application of the same yardstick that is used for quantitative studies. For a different research methodology, different criteria of good research are needed (Flick, 2009; Seale, 2003).

Developing such criteria has been the subject of relatively extensive discussions. A fairly coherent set of criteria of the quality and worth of qualitative research is Lincoln and Guba's (1985) framework of *trustworthiness*. It is relatively well known in the field of applied linguistics and language education through the discussion of 'justifying outcomes in qualitative research' by Edge and Richards (1998). This framework is based on the abstract conceptualization of notions such as reliability and validity, but rather than embracing or modifying positivist conceptions of research standards, the framework considers their abstract underlying concepts and re-conceptualizes them within the methodological climate of qualitative inquiry. Therefore, rather than adhering to positivist standards and imposing them on an epistemologically and methodologically incongruent qualitative research practice, we can develop a set of quality criteria congruent with the spirit of qualitative research methodology (Cho & Trent, 2014).

As an important part of this framework, the notions of objectivity and reliability are interpreted at an abstract conceptual level to mean neutrality and consistency, respectively. These two underlying concepts are then re-conceptualized and renamed as confirmability and dependability. Other concepts can also be similarly re-conceptualized to shape elements of a framework of assuring quality and rigor in qualitative inquiry. This seems to provide a methodologically congruent approach of viewing quality from a qualitative perspective and a way of escaping positivism in evaluating the processes and outcomes of qualitative research. However, even this conception of trustworthiness tends to be based on positivist sentiments in its deeper layers. To begin with (regardless of staying at the surface or moving to underlying concepts), why should we basically start with the quality criteria of positivist research? This very starting point is an admittedly positivist one. Moreover, when we move to the abstract level, we see that, for example, the notion of objectivity means *neutrality*. Is this abstract-level concept basically desired as an aspect of the quality of qualitative inquiry?

Qualitative Quality

A third approach is to refer to the very epistemological foundations of qualitative research—rather than the *methodological* bases, as in the case of seeking trustworthiness—in understanding the quality of qualitative research. The problem in the first two approaches lies in the fact that their underlying understanding is overtly or covertly shaped by positivist epistemological perspectives. Therefore, for a truly qualitative approach to the quality of inquiry, researchers need to distance and free themselves from such perspectives. Then, we would not need to concern ourselves with issues like neutrality or replicability that are basically not valued based on a constructivist epistemological stance. We would not need to focus on (pseudo-)positivist criteria to convince people that qualitative research is *scientific* (Seale, 2003, 2011). Rather, as qualitative researchers, we can see how our epistemological standpoints can be taken care of in the process of research.

With such an attitude, thinking about issues of quality in qualitative research is directed by relevant epistemological bases rather than distracted perspectives. This means "working out one's own position on the justification" of qualitative research and creating "a satisfactory way of articulating a *warrant* for qualitative research outcomes" (Edge & Richards, 1998, p. 348). Therefore, on the one hand, the concern of quality in qualitative research is about taking care of the theoretical depth of researcher's understandings; the contextual rootedness and relevance of findings; and the meaningful inclusion of the subjectivities of researchers and participants in the process of research. On the other hand, this concern includes avoiding haphazard ways of dealing with contexts, participants, and data; removing researcher whims in making decisions; reducing the influence of misconceptions and misunderstandings; and providing meaningful accounts of the research process and product to the audience of research reports. Details of such an approach to quality in qualitative inquiry are discussed in the following sections.

Understanding Quality Qualitatively

An important preliminary consideration in understanding and taking care of the quality of qualitative research is that—despite the taken-for-granted view in an atmosphere dominated by positivist research—the primary focus in this regard is not justifying and legitimizing the outcomes for *others* and convincing them that our research is sufficiently rigorous (Flick, 2007b; Morse, 2018). First and foremost, as qualitative researchers, we need to think about the quality of our research endeavor because we are naturally aiming to do meaningful inquiry, to go through a

fruitful process of discovery, and to gain meaningful understandings and valuable knowledge. When the process and the outcome of our research is meaningful to us, it is only a secondary concern and a much easier undertaking to present our research to others and to justify and support it as worthwhile endeavor.

Although discussions of quality and justification in qualitative inquiry tend to focus on reducing the possible threats created by subjectivities and biases, taking care of the meaningful role of subjectivities and contextualities should also be part of the concerns about quality in qualitative inquiry. Moreover, although convincing others has been the main concern in such discussions, convincing the self is the most important aspect in this regard. Therefore, the following issues of quality in qualitative research do include a concern for preserving meaningful contextuality and subjectivity and they are all researchers' own concerns in the process of qualitative research as well as their considerations in reviewing and assessing the outcomes. The same considerations may be the guidelines for the audience of qualitative research writing in assessing and interpreting the process and outcome of research, which is mediated by the notion of *transparency* discussed later in this chapter.

Integrity

In the context of the mainstream discourse of standards, measures, and quality control, it may sound odd to consider honesty as an aspect of quality. Even within the discourse of qualitative inquiry where much attention is paid to providing justifications and warrants for what qualitative researchers are doing, it has not been widely discussed. But integrity throughout the research process in making all theoretical judgments and practical decisions is an integral aspect of quality in qualitative research. It is not possible for you as the researcher to provide readers with an index of honesty when you report qualitative research, or for the audience of your report to check the honesty level of the project against a table of measures or a set of rubrics. However, as qualitative research heavily relies on the judgments and decisions of the researchers, their integrity and sincerity are crucial to good inquiry (Tracy, 2010).

The careful and honest judgments of researchers may be compromised for various reasons: coming to certain favored conclusions, supporting an early emerging research outcome without further examination, making the research process easier and less challenging, covering one's lack of theoretical knowledge, etc. When researchers act against such forces, they take important steps in increasing the quality of their research. This may be particularly important for beginner researchers who may feel the burden of questions about bias—raised by others or by themselves—in their qualitative studies. If you are sure that, to the best of your knowledge, you are making meaningful and responsible decisions in your research process, then why should you worry about rogue bias in the study? What remains is

meaningful subjectivity that is essentially part of qualitative inquiry and is made transparent to the audience of research as well.

Therefore, with deliberate attention to the issue of integrity in qualitative research, from early theoretical decisions to the details of dealing with data and interpretations, there would be no need to be afraid of the ghost of bias in your research. Not only that, when honesty and ethical conduct is part of your research and you know that you are articulating your theoretical position and extensively describing the practical process of the study, this subjective position can be part of the very essence of inquiry. One further important note about the issue of honesty as an aspect of research quality is that although it is a consideration mainly for the self of the researcher and does not provide a tangible criterion for outsider examiners, editors, and readers to judge your research, (lack of) research integrity does present itself for the outsiders as well, as in the case of too neat thematic structures referred to below.

The recognition of researcher subjectivity as a part of research does not mean that researchers can ignore important aspects of what goes on in a context just because they do not like them or it is practically hard to record them. It does not mean that the qualitative researcher can push interview participants to say certain things simply because they satisfy the researcher. Neither does it mean that in collecting already existing data bodies like documents, researchers can pick up certain things and ignore other things, simply based on what they 'feel' should be collected or left out.

In the process of data analysis, deliberate coding 'in favor a category' to highlight a certain type of codes—for any reason—is an example of dishonesty that targets the basis of robust research practice and meaningful research findings. This can amount to outright cheating that destroys any activity not just (qualitative) research.

Such dishonesties are not just ethical issues to be considered by researchers themselves. They can surface in the findings and can be detected in research reports. For example, one possible indicator of a questionable data analysis process is 'too neat' emerging thematic structures or too neatly woven emerging narratives. If the codes are presented in subcategories and categories balanced in quality and quantity and represent neatly shaped notions in addressing the research question with no unfitting, mismatching, or discrepant codes/categories, the process of analysis might be judged or at least questioned as possibly flawed.

Knowledge

Another apparently mundane but actually important concern in doing good research is researchers' expertise and knowledge about different aspects of their research. Good intentions and honesty are helpful if researchers are knowledgeable enough about what they are doing. A qualitative researcher needs to be as much aware and knowledgeable as possible in terms of three different aspects of research in language education. First, the depth of qualitative researchers' theoretical knowledge and understanding about the linguistic, educational, psychological, and sociological aspects of the research issue is the basis of a strong research question and a robust research process. Second, familiarity with the research context and intimate contact with the setting, people, and activities related to the research problem plays a crucial role in collecting and interpreting the data and making informed decisions throughout the study. Third, knowledgeability about the very idea of research at methodological and practical levels contributes to the quality of the theoretical and practical research involvements. Expectedly, research without the required knowledge on the part of the researcher cannot be good research.

Knowledge and awareness as an aspect of the quality of qualitative research is important for researchers themselves in attempting to do better research and is also assessable by the audience of research reports. For researchers themselves, knowledge and expertise obviously contribute to the quality of research. The deep understanding of the theoretical issues related to the research topic and awareness of the complexities of the context of research reduces the possibility of making wrong decisions about details of data collection and analysis. It needs no reiteration that researchers' subjectivities, theoretical understandings, and contextual positions are necessarily part of qualitative research, but researchers' awareness puts them in a position to make informed decisions rather than pointless biased ones. On the other hand, for outsiders, the assessment of different aspects of researcher awareness reflected in qualitative research writing can provide a means of evaluating the quality and strength of research. (See the section on "Transparency" later in this chapter for a discussion of how such an assessment is mediated through transparency that is realized through qualitative research writing.)

Contextuality

Based on the constructivist and interpretive epistemological foundations of qualitative research approaches, the context-based nature of understandings, decisions, and actions is an essential feature of such approaches. Preserving such contextual relevance at all stages of research is an important aspect of the attempt for maintaining the strength and quality of qualitative research. A broad theoretical endorsement of the importance of context is hardly enough for robust qualitative research practice, as there is always the threat of the researcher's detachment from the context for

various reasons. Subconscious retreat to positivist norms, the fuzzy and confusing nature of theoretical understandings of research context complexities, the practical difficulties of noticing and recording detailed contextual features in data collection, the subtleties of considering the contextual rootedness of data bodies when it comes to their interpretation, and the challenge of including relevant contextual information when writing qualitative research are among the important forces that may reduce the contextual situatedness of different aspects of qualitative research.

Therefore, de-contextualized qualitative research is bad research and, as part of their commitment to quality, qualitative researchers need to beware of, and act against such forces. The very early conceptualization of a research question and theoretical reading and thinking about it should be anchored in the context of a language learner or teacher's life, a foreign language classroom setting, a local community, a discourse community, etc. Designing qualitative research is also obviously context sensitive. Later, data collection essentially happens within a context without which data would cease to exist, and data analysis can be meaningfully done only if various aspects of the research context are considered. Even in writing and reporting qualitative research, the context needs to be reflected, and this is the spot where the contextuality of a study can be assessed by the audience of research as an indication of the quality of qualitative inquiry.

Subjectivity

Challenging as it might sound, preserving meaningful subjectivities, plays a role in good qualitative research. This can be an important criterion both for researchers themselves and for external readers. For researchers, obviously the most important part of the context of study is the people who are involved in a study as participants and researchers. Therefore, when thinking about the contextuality of research, particular attention needs to be reserved for people. Understanding research issues from the perspectives of the participants is a vital characteristic feature of qualitative inquiry and participants' subjectivities are perhaps the most important part of the contextualized understandings that are gained in qualitative inquiry. At the same time, this crucial part of research is always threatened by the same notions that are mentioned above as threats to contextuality: sediments of positivist mentalities, theoretical challenges, and practical difficulties. Therefore, with a concern for the quality of your research, take care of the subjectivities of those involved in your research (including yourself). Of course, what you cherish is what I call meaningful subjectivity as distinct from whims, discussed in the next section (Lincoln, 2011).

Subjectivities that shape significant aspects of the conceptual constructs of qualitative inquiry may stand in two broad categories. On the one hand, those who are involved as research participants bring their own wealth of attitudes, perceptions, and practices into our research. Understanding these participant features is sometimes the sole aim of research and sometimes an integral part of tackling other

research issues. On the other hand, researchers themselves have their own subjectivities and positions. Conscious attention to these subjectivities, understanding how researcher positions act upon the theoretical and practical sides of the research process, and explicitly stating them in research reports contribute to the quality of qualitative research. Part of researcher subjectivity in student research is related to supervisor positions that can also importantly influence the process as well as the outcome of research. Wise encounter with subjectivities at different stages of developing research questions and designs as well as data collection, analysis, and interpretation is part of the concern for research quality, and reporting them transparently is important in external evaluations by examiners, referees, and readers.

Avoiding Whims

The very issue of subjectivity, the preservation of which is a contribution to the quality of research, can also create troubles which should be tackled for the sake of research quality. In other words, subjectivity as a contributor to research strength can also act to weaken it. The distinction between meaningful subjectivity and *rogue* subjectivity may be helpful in this regard. It is true that participant subjectivity as well as researcher subjectivity is integral to qualitative research but this should be a source of doubt for outsiders about the basic legitimacy of qualitative research and a cause of hesitation for beginner qualitative researchers. In qualitative inquiry, never does anyone say that you can do whatever you wish at any stage of research. There is no talk of personal tastes, desires, wishes, and whims brought into the research process for no serious justification.

Qualitative research traditions have been aware that avoiding rogue subjectivities is perhaps the most important part of ensuring quality in qualitative research. It is obvious that qualitative inquiry which is shaped by meaningless whims is bad research. Therefore, understanding, recognizing, and accounting for participant subjectivities and researcher biases should take place in a challenging process of serious, careful, and meticulous thinking, decision-making, and action taking. A concern for good research does include conscious and painstaking attention to avoiding haphazard ways of dealing with theories, questions, contexts, participants, data collection, data analysis, interpretation, and research writing. On this basis, the well-known notion of flexibility at different stages of qualitative research is to be interpreted with care. Flexibility, rather than free variation at any point, means careful decisions for modifications by researchers obsessed with strong justification and reasoning for any modification. (See the section on Flexibility and Balance in Chap. 2.) That is why beginning researchers should know the role of subjectivities in qualitative research and, at the same time, should be aware of the importance of avoiding whims. On the other hand, they should be assured that accusations against qualitative research as necessarily inflicted with wild bias in essence are illusions of those who stand outside the realm of qualitative research and watch form a distance with suspicion.

Reducing Misconceptions

A further threat to any human undertaking, including any type of research, is the always-possible concern of misconceptions and misunderstandings. Apart from the general notion of mistake which may be imagined to happen at any stage of research with varying degrees of importance, misconceptions in data analysis and interpretation are particularly important issues that should be tackled as part of a concern for quality in qualitative research. This is especially important as qualitative inquiry heavily relies on researchers' conceptions and understandings. Therefore, qualitative researchers need to specifically plan for ways to help them avoid considerable influence of misconceptions on their research and to implement strategies of spotting misunderstandings when they happen to find way into the processes of data collection, analysis, and interpretation. Various types of *triangulation* and *member checking* strategies have been specifically developed in qualitative research traditions to reduce the possibility and impact of misunderstandings and misconceptions in qualitative inquiry. (See the section on "Triangulation" later in this chapter.) In addition to relying on triangulation as a way of taking care of quality in qualitative research for the researchers themselves, extensive and explicit accounts of the research process—including triangulation—can be provided so that outsider readers can assess the quality of qualitative studies from their own perspectives.

Staying Relevant

Finally, an important aspect of the meaningfulness of research is to sound relevant to the real audience of research (Gutierrez & Penuel, 2014; Rose, 2019; Tracy, 2010). There are different aspects to the issue of relevance of qualitative research outcomes. Primarily, you need to contribute to the research context, participants, and their wider community. If your study benefits them in a concrete way or even if it provides them with understandings about aspects of their own involvements, then your research is probably meaningful. Moreover, when you publish your study, the audience are more diverse than the participants and their life setting. Other groups of people with similar concerns, other researchers, academics, etc. also read the study. You need to sound at least partially meaningful even to the sections of your audience that share little with you in terms of theoretical perspectives and familiarity with the research context. This is not *generalizability* in the positivist sense, but understandings gained from qualitative research can be transferred to other contexts. An important consideration in this regard is that relevance to other contexts does not imply making big claims. If you stay focused and relevant to one setting, the wisdom you gain is probably relevant to other people and places as well. A final point is that, although your research and writing is subjective and context-based, you are not writing just to express your emotions and feelings. Consider the fact that you should communicate your research to others who are *different* people. (See the section on "Transparency" later in this chapter.)

Enhancing Research Quality

The multifaceted conceptualization of quality in qualitative research depicted above provides us with a theoretical framework of what robust qualitative inquiry looks like. On the one hand, this broad conceptual plan can assist researchers themselves in taking care of the strength of their research. On the other hand, it can provide outsider examiners, editors, referees, and readers of research with criteria to assess the quality of research conducted by others. The seven aspects of quality discussed above emphasize that there is good and bad qualitative research, and that they can be distinguished. But how are these criteria practically employed to improve qualitative research? What do qualitative researchers do to actually shape their research process based on their awareness of issues of quality in qualitative research?

The issue of quality, like other aspects of qualitative research, is contextually defined, constructed, and subjective. It cannot be reduced to rigid criteria and checklists. Researchers should construct the high quality of their inquiry as an embedded element of their study, and external evaluators should construe and assess the process and the outcome of each study as a unique inquiry in its own context of development (Cho & Trent, 2014; Lincoln, 2011). However, there are a few major considerations that can be applied by qualitative researchers in their attempt to take care of the seven issues in qualitative research quality that were discussed in the previous section. Each one of these major strategies of enhancing quality in qualitative research can contribute to all or some of those seven issues.

Reflexivity

A commonsensical practice that can contribute to the quality of qualitative research is researchers' constant monitoring of their own thoughts, understandings, judgments, decisions, and actions throughout the process of research. Such an attitude of reflexivity primarily contributes to integrity in the research process. Secondly, it is a required practice for recognizing the need for theoretical reading and knowledgeability on the part of researchers and for constantly monitoring the possible gaps in their expertise, skills, and knowledge of the context of the study and research procedures. Moreover, you do need to live with reflexivity and continually monitor your own position in the process—especially in dealing with data in the process of collection and analysis—to be able to notice and include relevant contextual details in your study; to be able to take care of meaningful subjectivities of your research participants and yourself; to be able to avoid whims and intruding desires; to be able to reduce misconceptions; and to stay relevant to your research context and audience (Tracy, 2020).

Triangulation

A well-developed and sophisticated approach of practically enhancing the quality of qualitative research is reflected in a diverse set of strategies known as triangulation. In plain language, it means doing things in more than one way to reduce the possibility of mistakes and misunderstandings. "In social research terms 'triangulation' is used to refer to the observation of the research issue from (at least) two different points" (Flick, 2004, p. 178). The logic of triangulation is a commonsense understanding of the fact that in almost any human involvement, double-checking, involving more people in monitoring a process, collecting more evidence, and looking at something from more angles naturally enhances the accuracy of judgments and reduces the possibility of mistakes and misconceptions. Triangulation is an umbrella term that can be realized in different ways to enhance the quality of qualitative inquiry and reduce the impact of sources of threats and weakness.

Perhaps the most conveniently applied and, therefore, the most widely used type of triangulation in qualitative inquiry—including qualitative language education research—is data triangulation, that is, the application of more than one type of data and more sources of data in a study. As exemplified below, data sources like observation, interview, and various types of documents can be used in a single project. Moreover, variation in data can be created by variation in data collection approaches (like different kinds of interviews), different instances of data collection (like observing more settings), different rounds of data collection (like observing a language classroom in two different terms), extending the time period of data collection (like collecting media data in longer periods of time), including different types of documents (like different textbooks or more policy documents), and referring to more participants and informants (like interviewing more people or including diaries of more participants).

It needs little argument that relying on findings from multiple data categories can enhance contextuality and reduce the impact of possible misconceptions in research. If the analysis of added bodies of data confirms findings from primary data, this contributes to the strength of your research. If later analyzed bodies of data contradict previous findings, then there is enough reason for further scrutiny and more careful reconsideration of the entire research process. Although findings from different bodies of data in qualitative research cannot usually be put next to each other in search of simple cases of match/mismatch or confirmation/contradiction, findings from multiple data sources and multiple data bodies obviously add to the depth of understandings and illustrate the diversities existing in the context of study and the participants' perspectives and practices.

Scholarship in the area of first language literacy teaching and learning has a long history of more than a century, with more recent socio-culturally oriented 'literacy studies' enjoying at least four decades of debates and research (Barton, 2007). *Therefore, the background of practice, theory, and research in first language literacy studies may be a rich source of ideas for the relatively younger field of second language education.*

Therefore, it can be an intriguing research idea to explore different aspects of bringing theoretical perspectives developed in literacy studies into second language classes. The opportunities created by approaches such as critical literacy, whole language, and multi-literacies for second language teaching and learning in different contexts as well as the challenges of inviting such perspectives into second language education can be important research issues.

A study on challenges and opportunities created by the application of, for example, multiple literacies perspectives in teaching English as a second language to teenager learners can be shaped by exploring a course specifically developed to teach based on such perspectives. Such a study can rely only on interviews with a teacher who teaches such a course. Alternatively, the study can rely on data gained through participation and observation of the class sessions and recording fieldnotes.

However, imagine the depth that can be potentially reached if the researcher decides to collect the following data types: classroom participation and observation; recording descriptive fieldnotes; writing reflective memos; audio recording of classroom interactions; interviews with the classroom teacher; informal interviews with students; in-depth interviews with selected students; video recording of students' oral presentations; samples of the prepared classroom teaching materials; and samples of student writings.

Analyzing these multiple data types gained through a rich triangulated data collection process can expectedly provide deeper insights about the opportunities and challenges created by bringing multiple literacies perspectives into second language education. The potential of data triangulation can be illustrated by comparing the expected findings of such a study with a project relying on one of these data bodies only.

Another kind of triangulation is the involvement of more than one researcher in the process of qualitative inquiry. Researcher triangulation may take place in different ways. One way is to have more than one researcher involved in all theoretical and practical decisions throughout the project. A second way is to invite co-researchers, assistants, or consultants to help with certain stages of a study. Different parts of data collection and data analysis are particularly challenging steps of research that may raise the need for the help of co-researchers. Moreover, in supervised projects like student research projects, the involvement of supervisors can

create a kind of researcher triangulation in qualitative studies. Researcher triangulation relies on more eyes, more ears, more hearts, and more brains to shape a feasible way of enhancing the quality of qualitative research by increasing the theoretical strength and contextuality of research as well as reducing misconceptions in data collection, analysis, and interpretation.

"When triangulation is discussed in the context of quality issues in qualitative research, most authors refer to methodological triangulation." (Flick, 2007b, p. 55) Methodological triangulation refers to the complex and demanding process of applying more than one research method (between-method triangulation) or more than one variation of a method (within-method triangulation) (Flick, 2004). The term method here mainly refers to the data analysis approach employed in a study. Going through the challenging process of exploring your bodies of data through multiple procedures probably reduces the possibility of distractions and provides you with more robust findings. This may include, for example, the application of both similarity-based and contiguity-based procedures, or using different contiguity-based methods like narrative analysis and phenomenology (Maxwell & Chmiel, 2014). The borderline between different types of triangulation is not always clear. For example, it is not easy to label the collection of narrative and focus group interviews and respectively analyzing them through narrative analysis and coding as data triangulation or methodological triangulation or both. Regardless of labels, however, the contribution of triangulation to the quality of qualitative research is evident.

Corroboration

An extended conception of reflexivity takes shape when research is carried out by more than one person—and this is often the case. Co-researchers, advisors, and consultants are usually involved in research projects. Even student research and graduate theses are not done by solo researchers, as supervisors are always involved. Therefore, beyond individual reflexivity, those involved in a study can reflect on and critique what other partners in a research project do. Moreover, each member of the research team can monitor the whole process of research in terms of theoretical bases, decisions at different stages, and practical procedures. When it comes to researchers' subjectivities, corroboration in a research project might add to the complexity of multiple positions and perspectives and makes it harder to meaningfully integrate their subjectivities as a whole. However, through this very multiplicity of perspectives, corroboration can contribute to integrity, knowledge, contextuality, reducing misconceptions, and staying relevant in the process of qualitative research and in presenting the outcomes. At another level, corroboration happens when the wider community of the field reads, reflects on, and critiques the qualitative research report (Lincoln, 2011).

Transparency

As discussed in the previous sections, researcher reflexivity and triangulation contribute to the strength of qualitative studies, and corroboration extends the scope of reflexivity. Transparency may be viewed as a way to further extend this scope and invite the reflections of the wider community of readers of your qualitative research into a broad monitoring process. The basic idea is that when reporting a study, qualitative researcher-writers should describe and illustrate different stages and steps of the research *process* so that it can be retrospectively monitored and assessed from the perspectives of readers whose perspectives can be naturally different from those of the researchers themselves (Tracy, 2020). Transparency is an issue at the stage of research writing and presentation. On the one hand, you should describe the research processes and procedures in detail. Thick description which is a way for researchers to gain detailed accounts of events in contexts can also be applied in writing to illustrate the context, participants, data collection procedures, and data analysis techniques. On the other hand, in presenting the research findings, providing ample illustrative data excerpts in the text of the research report can also add to the transparency of the report through providing readers with the opportunity to make their own inferences and interpretations.

Embedding the concern over the quality of research in the very process of inquiry is important. "But this will only become visible as quality in qualitative research, if the researchers manage to transfer their aims and claims, their strategies and standards and how they worked with them to the readers of their research. In this way, writing about research is… [an] important part of qualitative research if we want to assess the goodness of research or if we want to allow readers to assess it." (Flick, 2007b, p. 138) The very knowledge that the research process is retrospectively presented to external audiences can be a way to contribute to more careful decision-making in the research process and to enhance the quality of research. Moreover, based on a transparent presentation of the research process and products, other possible ways of addressing the research question can be re-constructed by the readers of our research in accordance with their own theoretical standpoints and contextual perspectives.

Ethics in Qualitative Research

The quality of processes and products cannot be approved as desirable in any type of human activities without a concern for ethical considerations. There have been extensive philosophical debates about the different meanings, multiple conceptions, and various types of questions about the notions of ethics, ethical, and unethical. However, the conception of ethics that we need to consider in qualitative language education research is not a philosophical subject of debate. It is a mundane commonsense understanding of the term, close to the idea of "what is good or right, as

contrasted with the unethical – what is bad or wrong" (Hammersley & Traianou, 2012, p. 17). Importantly, such an idea does not merely refer to a set of institutional prescriptions of right and wrong in conducting research (Anderson, 2017; De Costa, Lee, Rawal, & Li, 2020). In considering such a conception of ethics in research, and in line with the spirit of qualitative inquiry, we need to note that in out-of-context philosophical or institutional discussions of ethical considerations "the words 'good' and 'right' are very abstract or 'thin' in meaning… In other words, when we use them to describe some specific course of action, person, or situation, much of their meaning derives from the particular context" (Hammersley & Traianou, 2012, p. 19).

Like many other aspects of academic research, ethical concerns in research started to be highlighted in hard science research that dealt with human *subjects*, as they were called. Physically harming them was perhaps a main concern then, but ethics in research has evolved very much. In social sciences, physically harming the participants or threatening their life is not much of a concern but the subtleties of participants' psychological and social situation in the context of the relationship between participants and researchers are crucial (Hopf, 2004). In practice, although there are no agreed-upon standards of research ethics even in the case of quantitative social sciences, what has been called 'the ethics of consent' (Shaw, 2011) has been the major consideration. "This means that research subjects have the right to know that they are being researched, the right to be informed about the nature of the research and the right to withdraw at any time" (Ryen, 2004, p. 219).

Flick (2007a) lists some principles of ethical research: informed consent (no participation without proper information and the right to decide); avoiding deception (by covert data gathering or providing false information); respecting the privacy of the research participants; preventing the omission of data, addition of fake data pieces, or fraud in analysis and interpretation; and the consideration of respect, beneficence, and justice in relation to research participants. Although they are not as neatly applied in practice as they may seem in theory, these principles cover most of the ethical considerations in social science research, including qualitative studies in language education research. However, the actual observation and implementation of such principles in qualitative research can be different from experimental social science research due to the very nature of contextual involvements, the nature of research participation, and the depth and intricacies of researcher–researched relationships and interactions.

There are two important features that create special ethical considerations in qualitative inquiry. On the one hand, as discussed at several points in previous chapters, flexibility and emergence is an integral characteristic of designing and conducting qualitative studies. This makes it difficult to *inform* participants of what they would go through in the research process, simply because the researchers themselves do not have a fixed plan of this process (Shaw, 2011). This open and evolving feature of qualitative inquiry makes it difficult even "to *predict* the occurrence of harm with any precision" (Hammersley & Traianou, 2012, p. 64). On the other hand, the very attempt of qualitative researchers for being contextually relevant and respecting participant subjectivities may provide them with access to some

hidden corners of participants' lives that may not be accessed in quantitative studies. The very trust of participants in what qualitative researchers undertake may lead them to revealing more than they would normally do (Ryen, 2004; Shaw, 2011). This implies more responsibility on the part of the qualitative researcher in respecting research participants' privacy.

Moreover, like many other aspects of qualitative research, in dealing with ethics, some of the most commonly used and taken-for-granted notions in experimental studies may need to be re-conceptualized. In the case of the most widely discussed notion of *consent*, the mere signing of a form by participants cannot be necessarily taken as *informed* consent. There is a more profound question: are they really informed or—for whatever reason—misinformed? (Hammersley & Traianou, 2012). "Typical questions, which are also regularly asked in qualitative research, include the following: the question of how voluntary was participation in the investigations, the question of guaranteeing anonymity and confidentiality" (Hopf, 2004, p. 334). In the case of considering privacy, too, there is the concern that with in-depth engagements of qualitative researchers with the thoughts and feelings of research participants, we should be careful about the meaning of privacy, respect, and harm in different cultures and contexts (Hammersley & Traianou, 2012). Stereotypical conceptions of such terms may not suffice for truly ethical conduct of qualitative research.

Therefore, to take care of research ethics, the bottom line is to consider the general ethical concerns of social science research: respect the subjectivity as well as the privacy of your research participants; respect their right to *know* enough about the process and outcome of your research and their role in it; do not harm them in any way; and avoid deception, both in engaging with the research participants and in dealing with your data and reporting your research (De Costa et al. 2020). However, these premises are to be complemented in a few ways: first, consider the methodological features of qualitative research that create particular sensitivities to these notions in practice; second, be attentive to the required re-conceptualization and reinterpretation of otherwise simple notions like consent in qualitative inquiry; and do consider the contextual nuances in your study, which may be importantly related to the fact that you are addressing issues of language and learning in your study.

Questions

- *Is it not possible to be objective in qualitative research at the same time that we adhere to contextual understandings?*

As discussed at various points in this book, objectivity in the sense of removing human subjectivities and looking for rigid, factual, and universally applicable truths is a conception based on positivist assumptions. Such a conception is not only unattainable but basically undesired on the basis of constructivist perspectives. However, if objectivity means avoiding whims, emphasis on gaining meaningful and relevant understandings, and minimizing the influence of distractions and temporary moods, attitudes, and rogue desires, qualitative traditions of inquiry have had various ways

to take care of such concerns. Qualitative researchers should be mindful about seeking meaningful understandings despite all types of possible distractions including haphazard wishes and whims of the researcher, but thinking about researching devoid of any influence of researcher positions, tendencies, and subjectivities is not on the agenda of qualitative inquiry.

- ***Regardless of epistemological orientations, is it not always better to be able to extend the scope of findings in a study to other contexts and people?***

Like the case of objectivity, the conception of generalizability of exact findings gained through experimental procedures and through probability testing is a positivist conception and part of the quantitative research tradition. Within a constructivist epistemology, there is no reason to be concerned with such a conception. If the question is about the meaningfulness, usefulness, and relevance of research findings to other contexts, people, and problems, one may argue that good qualitative findings inherently enjoy a potential to contribute to the creation of understandings and wisdom that can be transferred to the rest of the world. Whatever one learns from the experience of meaningful research can stay with the researcher and all those informed about the research findings for the rest of their life and in other contexts of the world.

- ***How can we make a distinction between whims that are to be avoided and meaningful researcher subjectivities that are to be respected in qualitative research?***

It should be noted that this is an issue mostly related to the inner world of the researcher and has to be internally monitored rather than externally controlled. Perhaps the most important arbiter in this regard is the self of the researcher reflexively considering the two sides of the concern. Therefore, although transparent research reports can expose the research process to a wide group of audience and can invite reflections in a process of corroboration, proposing a set of criteria to be applied for the external assessment of researcher positions is out of question. Having said that, one might still think of a very tentative idea to be considered by researchers in monitoring their own research involvements. Whims and rogue subjective tendencies usually change rather quickly to make things practically easier, but positions based on more profound understandings and subjectivities tend to be fairly stable over time and may make the actual procedures more difficult and painstaking. So, beware of always changing moods and beware of quick decisions that you are tempted to make for quick-fixing emerging issues when things get hard.

- ***Integrity and honesty are almost never detectable in a research report. How can we rely on such a notion as a criterion of qualitative research quality?***

This is not a quality concern only about qualitative research. In almost all human involvements, honesty is a necessity of good practice. In quantitative research, too, the false implementation of standards, faking different parts of the research process and procedures, and the manipulation of data are always possible and can basically blow the research endeavor. The point is that the mainstream quantitative traditions tend to focus on external criteria rather than such internal values and orientations.

Therefore, despite the fact that honesty is not an externally measurable or controllable criterion, it is an important aspect of good research that should be constantly considered by researchers themselves as the first assessors of their own research practice.

- *After a study is published, how is it possible for transparency and corroboration to contribute to its quality?*

There are two points to consider about this question. First, it is understandable that awareness of the prospective reflection and evaluation by other members of the community may push the researcher toward more careful decision-making and acting in the research process. The community includes immediate readers and evaluators like supervisors and examiners; distant assessors like journal editors and reviewers; and more distant audience groups of academics, scholars, researchers, and professionals as readers of dissertations and theses and published research reports. Even the prospect of being judged by readers of a thesis in an electronic database or a journal article in a faraway country can potentially enhance the quality of research. The second consideration is that enhancing the quality of qualitative research in the field as a whole is more than checking the quality of a single study. Prospective reflections on finalized and published research can enhance the understanding of the community of applied linguistics and language education about qualitative inquiry in general and can, therefore, contribute to the quality of future qualitative studies in the field.

Further Reading

- **Edge, J., & Richards, K. (1998). May I see your warrant, please? Justifying outcomes in qualitative research. *Applied Linguistics, 19*(3), 334–356.**

Revisiting the basic conceptions of quality and rigor in research, this article addresses the challenge of justifying the process of qualitative inquiry and presenting the findings as legitimate research outcome in the specific area of applied linguistics and language education. Reviewing the paradigmatic disputes in research methodology, Edge and Richards argue that (novice) qualitative researchers who rely on epistemological positions other than positivism need to consider the triple concerns of position (affiliation with a particular research tradition), voice (the reflection of the perspectives of those involved in research), and representation (the expression and presentation of research) with regard to their studies. The authors then discuss three possible orientations toward understanding and taking care of quality in qualitative research: extending the positivist tradition; adopting an alternative framework of trustworthiness (Lincoln & Guba, 1985); and developing an independent position based on principles of authentication, legitimation, and corroboration.

- **Flick, U. (2007b). *Managing quality in qualitative research*. London: Sage.**

Specifically devoted to the issue of quality in qualitative inquiry, the book "tries to outline concrete strategies of how to manage the problem of quality" (p. xv), in a broad sense that can encompass a variety of qualitative approaches and traditions.

Flick presents a conceptualization of quality as a general concern embedded in the process of qualitative research rather than a set of tricks detached from the act of research. The following are the highlights of concerns addressed in the ten chapters of this book: the general theoretical approaches and understandings of quality in qualitative research; specific procedures and strategies for managing qualitative research quality; the central notion of triangulation in qualitative inquiry, its history and development, and implementing the actual practice of methodological triangulation, in particular; the debate over the contribution of mixing qualitative and quantitative research to rigor and quality; and issues of ethics in this regard.

- **Tracy, S. J. (2010). Qualitative quality: Eight "big-tent" criteria for excellent qualitative research. *Qualitative Inquiry, 16*(10), 837–851.**

Tracy provides a specific framework of understanding, preserving, and assessing the quality of qualitative research. As a preliminary, she raises a crucial question about the possibility of such a framework: "is it possible to create a parsimonious set of universal criteria for qualitative quality that still attends to the complexity of the qualitative landscape?" (p. 839) After answering "with a tentative but hopeful "Yes"," the eight tents of the framework are presented: worthy topic (which is relevant, significant, and interesting), rich rigor (based on meticulous handling on data), sincerity (integrity, self-reflexivity, and transparency about values and subjectivities), credibility (detailed, illustrative, and multifaceted exploration), resonance (appeal to diverse groups of audience), significant contribution (theoretical as well as practical), ethical considerations, and the overall coherence of research. Tracy does also emphasize the importance of "following, playing, and improvising" (p. 848) with regard to the quality concern in qualitative inquiry.

- **Lincoln, Y. S. (2011). Emerging criteria for quality in qualitative and interpretive research. In P. Atkinson & S. Delamont (Eds.), *Sage qualitative research methods* (Volume IV) (pp. 399–414). London: Sage.**

Lincoln's chapter approaches the concern of qualitative research quality from the vantage point of observing criteria that are 'emerging'. In her own words: "I prefer to think of this issue of quality as a dialogue about emerging criteria. I label this discussion that way because I believe that the entire field of interpretive or qualitative inquiry is itself still emerging and being defined." (p. 399) After an overview of the epistemological distinctions between positivist views of research quality (rigor) and constructivist conceptions of the issue (trustworthiness), the author presents and elaborates on several emerging criteria within the landscape of constructivist qualitative inquiry, including: some proposed fixed sets of standards; 'positionality' as a criterion of judgment; recognizing the research community as arbiter; how research reflects different voices; reflexivity and critical subjectivity; and reciprocity as an essential feature of inquiry. Lincoln also cautions about possible misconceptions of these emerging criteria.

- **Hammersley, M., & Traianou, A. (2012). *Ethics in qualitative research: Controversies and contexts*. London: Sage.**

The book is entirely devoted to the problem of qualitative research ethics. After a general introductory chapter, the authors explore the very terms 'ethics' and 'ethical' in the first chapter of the book. They also present an overview of various philosophical approaches to conceptualizing the notion of ethics. The next chapter focuses on the distinction between ethics as values that define the essence and purposes of research and ethics as a set of extrinsic norms in treating research participants. Chapter three examines the notions of harm and benefit and elaborates on the possibilities of harming various groups of people involved in qualitative research. The fourth chapter dwells on the idea of 'informed consent'. Some related theoretical underpinnings such as freedom and autonomy and their contribution to the understanding of ethics in qualitative research are discussed. Then, the authors address problems of 'privacy, confidentiality and anonymity' before a brief closing chapter.

- **Anderson, C. (2017). Ethics in qualitative language education research. In S. A. Mirhosseini (Ed.),** *Reflections on qualitative research in language and literacy education* **(pp. 59–75). Cham, Switzerland: Springer.**

The chapter sets out from a view of ethics as "a key element not just in considering how research should be conducted, but in considering the nature and purpose of research" (p. 59). Anderson elaborates on the increasing concern for ethics in academic research in institutional settings and emphasizes the particular importance of ethical considerations for qualitative researchers. Then, more specifically, he refers to his personal experiences of involvement in qualitative inquiry as well as some historical considerations in arguing that in the area of second language education, research ethics had had a marginal role. A major part of the chapter is then devoted to revisiting some ethical issues in Anderson's own doctoral research. Refering to his ethnographic research that comprised observations, interviews, and document analysis, he attempts to illustrate how ethical issues are embedded in all aspects and steps of qualitative research.

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Chapter 10
Qualitative Research Writing

Check for updates

This final chapter discusses the presentation of qualitative studies in writing. Although not part of the technicalities of the process of inquiry itself, the quality of reporting the process and outcomes of research plays a crucial role in completing the research endeavor in different ways. Apart from sharing the research with different groups of audience, thinking about research presentation serves two other important purposes. The very attempt at putting the pieces of a research project together and preparing an account of a study to be read by outsiders can help researchers distance themselves from the details of the project, see it as a whole, notice the possible shortcomings, and add to the depth of interpretations and understandings. Moreover, as discussed in the previous chapter, transparency and corroboration are important concerns in qualitative studies. Therefore, presenting the details of the process of research and illustrating the findings are essential aspects of the overall process of taking care of the quality of qualitative research.

Sharing research findings can take place in the form of non-academic writing and oral presentations as well but academic writing is a more challenging way of presenting research. Moreover, considerations about the features of presenting research in academic writing can be applied to other more liberal forms of presentation as well. That is why this chapter focuses on writing academically about qualitative research in language education. Research writing may take different shapes and formats—as discussed later in the chapter—and "reach an extremely diverse array of audiences" (Yin, 2011, p. 257). That is why a major preliminary issue to consider is who the readers are. "The first consideration – and one of the most important – in preparing to write your final report is deciding whom the report is for." (Merriam & Tisdell, 2016, p. 268) Therefore, as expected from essentially *contextualized* qualitative inquiry, perhaps all the discussions in this chapter should be understood based on a consideration of the wide context of your writing including the audience: "decide what audience you wish to reach and adjust your style and content accordingly" (Taylor, Bogdan, & DeVault 2016, p. 204).

Writing Qualitatively

Although the epistemological foundations of qualitative research most importantly resonate in the essence of inquiry processes, the apparently marginal aspects such as reporting and presenting qualitative research should also be congruent with the spirit of the inquiry. Novice writers' art of achieving this congruence and their actual mastery in constructing qualitative writing is a challenging endeavor which needs to develop over time, and takes independent books even for providing preliminary guidelines and hints (Weaver-Hightower, 2019). The art of (academic) writing and, more specifically, qualitative research writing may basically be more *learnable* than teachable, especially when 'writing the world' of research is included (Mirhosseini & Kianfar, 2019). An important aspect of this challenge is to extensively and reflectively read qualitative research writing through time and then to experience writing in action (Flick, 2009). However, within the limits of this final chapter, there are a few ideas that may provide insights into writing as a late stage of qualitative inquiry.

Sharing Learning

Within the spirit of qualitative researching, in search of meaning, learning, lifelike knowledge, and wisdom, qualitative research writing can go beyond reporting research results following the strict frameworks of academic and institutional structures (Badley, 2019). When your inquiry addresses topics, problems, and questions rooted in and emerging from the general life concerns, language-life concerns, or language-education-life concerns of real people; when you tackle questions based on evidence rooted in the depth of your research contexts; when you attempt to explore and interpret your data in light of the contextual complexities of your study; and when you consider researchers' and participants' unique personalities, subjectivities, and human character, your written report of the inquiry cannot suddenly turn to an impersonal and lifeless report of the process as a mere *project*.

Therefore, to begin with, envision the written account of your qualitative research as a memoir of the inquiry journey that you experienced. Just as you sought the research participants' real, honest, and clear accounts of their contextual experiences that related to your research concern, aim to express and share your own account of what you did and understood in the context of the study (Yin, 2011). It is true that institutional obligations, expectations, frameworks, styles, formats, and of course deadlines are always there. You can hardly ever do academic research writing with the same freedom and flow of creative writing or the way you talk to your personal 'dear diary'. However, aim to share your experiences, challenges, findings, learnings, and whatever you gained in your qualitative research on a language

teaching and learning issue with your readers. Limits, formats, and deadlines—sometime hand in hand with supervisors and examiners—will do their own job but you stay as much loyal as possible to the spirit of the entire research journey at the stage of writing as well.

Writer's Voice

Apart from the intention of writing for sharing rather than merely fulfilling academic requirements, a further aspect of adhering to the spirit of qualitative inquiry and its epistemological bases is to include the voice of the researcher-writer in writing. Throughout the steps and stages of qualitative research, deliberate emphasis is put on the contextually constructed nature of phenomena and the peculiar subjective perspectives of all those who are involved. In conceptualizing the research question, it is important to consider who is shaping the question and who the question is about. In collecting qualitative data, it is especially important to include the participants' point of view and their lived perceptions in all bodies of data collected through any procedure. In exploring the collected bodies of data, the personality and perspective of the participants is always an integral part of making sense of data. Moreover, in all these processes, the *who* of the researcher is a recognized and respected part of the inquiry that essentially contributes to truly contextualized qualitative decisions and understandings.

Therefore, it is a well-justified expectation to proceed with the same attitude and to include the subjectivity, the worldview, and the voice of the researcher—here acting as the writer—in writing qualitative research (Saldana, 2011). One aspect of this presence of the writer's voice in the text is the simple use of first person. Once, it was the norm in academic writing—and in some cases, still it is—for the writers to refer to themselves as *the researcher* or *this researcher*, or to basically avoid active sentences so as not to require to use *I*. This is now over even in writing experimental reports. Even the notorious widely used publication manuals that dictate the mechanics of writing down to the smallest full stops are now suggesting the use of *I* in academic writing. The voice of the qualitative writer should be louder than that, and can bring the perspectives, interpretations, attitudes, and concerns of the researcher-writer into the text.

> Hausler, Leal, Parba, West, and Crookes (2018) *share narrative accounts of their identities in the process of becoming researchers in the area of applied linguistics and language education. They view their study as methodologically based on their collective memories realized in their narrative analysis and writing. The authors present an instance of constructing as well as presenting and sharing writers' voice in research writing.*

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In highlighting the 'voice' reflected in their collective writing, they state: "In this piece of writing, "we" are mostly a group of doctoral students, and that is already a challenge to the dominant author position to be found in academic journals such as this one, which while having a political mission nevertheless usually conforms to a large extent to mainstream academic writing conventions." (p. 282)

The authors also emphasize their 'sharing' attitude: "We are interested in telling our own stories as a way of understanding ourselves, in the hope that other junior researchers may learn from hearing something like their own voices sounding off in print… Here, we have created a narrative that represents the process of the political socialization or conscientization as we have experienced it – which we have developed, not individually, but together through sharing our stories, discussing them, and following through rewriting them and the entire narrative to make some, admittedly conflictual, sense of it." (p. 283)

Writing for Research Quality

Including the voice of writers in qualitative research writing situates the text within the context of their understanding of the theoretical side of the research issue, and places the research findings in the actual context of research which the researchers have lived with and within. This is important in terms of putting the reader of qualitative research texts in a position to understand the complexities of the study and the findings and interpretations with an—at least partial—understanding of the theoretical and practical context of research. Therefore, bringing the voice of the qualitative researcher-writer into the qualitative research text can help the audience with a better understanding of what they read. However, this is not the only importance of the presence of the writer in the text. As discussed in Chap. 9, the audience of qualitative research reports play an important role in taking care of the quality of qualitative research, and this role depends on how the qualitative research is written and how explicitly researcher positions are illustrated.

As we have seen throughout this book, the perceptions, positions, and attitudes of qualitative researchers is an integral part of all aspects of research. Qualitative research is, therefore, subjective and in a sense *biased* and is 'proud of it', as mentioned in the previous chapter (van Dijk, 2001). This pride, however, does not lie in the attitude of *no rules, no responsibilities*. Qualitative research is proud of not hiding the role of researcher agency and subjectivity in the process of research. It is

also proud in *explicitly stating* its position so that researcher perspectives can be constantly discussed and critiqued. This is the particular point where the role of qualitative research writing is prominent in contributing to the quality of qualitative research.

Within the atmosphere of qualitative research writing as part of the process of increasing the research quality, researchers know that their theoretical positions and practical decisions are to be later showcased in their research reports. This is in itself a push for them to deepen their understandings and positions and to exert more deliberation and self-reflection in making decisions at different stages of their research. Moreover, explicitly stating the positions of the researcher in qualitative writing—regardless of the robustness of the research process—still invites the audience to make their own judgments, to interpret the findings differently, and to pick up their own points based on their own different positions. Below are a few considerations that can help researcher-writers practically contribute to enhancing the quality of qualitative inquiry through their act of qualitative research writing.

Reader Involvement

Invite your reader into the atmosphere of your research problem, process, findings, and interpretations. Both for the sake of increasing the understanding of the audience about your study, and for providing the space for the critique and assessment of your research—and therefore, contributing to the overall climate of increased quality for qualitative inquiry—you need to write about your research in a way that involves the audience in the research. Inviting the readers to become involved in your research primarily means providing as much detailed accounts as possible about the theoretical basis of the study, research problem, design, participants, settings, data collection procedures, and data analysis processes.

Elaborate on the theoretical background of the study from *your perspective*; discuss the contextual and/or textual origin of the research topic and how you conceptualize the research question; discuss and justify aspects of why and how you designed the project in the way you did; elaborate on as many aspects of the research setting as possible in as much details as the space allows; tell the readers as much as you know and you can about the background, characteristics, perspectives, and attitudes of the research participants; describe the quality and quantity of the data collection procedures, processes, and outcome; and, provide detailed accounts of the analytical approach and findings. (For elaborations on such detailed accounts see the two sections on "Illustrative Writing" and "Findings and Discussion" below.) People read your qualitative research writing with their own positions and perspectives and, therefore, there is always the possibility of more understandings and interpretations that can emerge from your study than what you attain yourself.

Illustrative Writing

Detailed descriptions of research questions, designs, settings, participants, and even data collection may be relatively straightforward but illustrating your findings and what they mean to you can be more challenging. One way to be illustrative in your elaboration on the findings is to provide extensive data examples and to present detailed explanations about each case of exemplification. The examples allow readers to judge the robustness of the process of data analysis based on what they see as the outcome of that process. On the one hand, they can better understand what you claim to have found and understood through the study. On the other hand, they can make judgments about your analysis of the bodies of data, what you observed in them, and your interpretations.

If your findings are based on coding procedures, when you present the emerging thematic structure, each one of the subthemes in the last level of your categorization needs to be accompanied by as many examples as the space in that particular writing venue allows. The more examples you can include in discussing each subtheme, the better you can illustrate that particular subtheme and its higher order themes, and, by extension, your overall findings and understandings. To the extent possible, include examples from different sources of data, different points in the time of your data collection period, different participants, and different situations. You need to show your readers that each subtheme is shaped by codes and patterns from a large part—ideally, almost all areas—of the landscape of your data (Taylor et al., 2016; Tracy, 2020).

If your analytical approach includes narratives and even critical accounts or artistic elements, you should include cases of stories, events, and incidents that you focused on in the process of data analysis. In narrative analysis, if the number of stories you focus on is limited, present all of them in detail along with your discussion about them; if you have more stories than you can fully include, re-tell the coherent stories that are constructed out of the data in as much details as possible. When you have a full image of the participants' accounts of events included in the research report in the form of a coherent whole, readers are equipped to both understand what you discuss and explain as your understandings and research findings, and to judge the way you construct that story and interpret it.

There are a few mistakes that might reduce the quality of your illustrative writing. The insufficient provision of data extracts and examples is obviously the first one. Use ample excerpted pieces of data to *show* what you found in your research rather than just trying to *tell* the readers about the findings. Another mistake is to heavily rely on extreme and eye-catching examples rather than typical and representative ones. To show what you understood in the overall process of research, present typical illustrative examples first and discuss special cases as special later. A related mistake is to bring examples from a limited part of your data rather than the entire data landscape. If your emerging (sub)categories are meaningfully shaped by codes from different parts of data, the examples should illustrate this. And, do not over-use data examples. Presenting too many pieces of data extracts and too lengthy ones

without proportionate explanation can mean leaving the audience with snapshots of raw data with little analysis done by the researcher. Explain what you see in the data and weave the explanation and exemplification as a coherent discussion of findings.

Findings and Discussion

This section might be seen as a reaction to prevailing forms of statistical research reports. In typical formats of reporting quantitative studies in theses or journal articles, there are usually separate sections of *results* and *discussion*. These two sections conceptually follow a process of *analysis* which normally happens in the brains of computers based on mathematical formulae. Therefore, the reader assumes that a number of calculations have been done by a computer software, then reads a description of the results of these calculations, and then an explanation and discussion of those results. In writing qualitative research, relatively extensive and detailed accounts of the process of data analysis are presented and then some aspects of dealing with data in the process of analysis, the findings that emerge from that process, and the discussion and explanation of the findings are presented in an integrated manner (Matt, 2004; Tracy, 2020).

When the analysis comprises coding procedures, in a chapter or section where the findings are presented, you can integrate and present the detailed structure of the themes and subthemes that emerged from the analysis of data; ample extracts and excerpts of the data to exemplify codes and patterns that shape each thematic line; and explanations about what you see in each minor and major theme and the overall thematic structure of the findings and how you address the research question on that basis. In such an integrated account of the core of your inquiry, readers can rely on the outcome to gain a tentative idea of the process of analysis, can see your understandings and interpretations of the findings, can assess these processes and perspectives from their own standpoint, and can importantly rely on this illustrative writing to somehow do their own analysis of your data and gain their own understandings in addition to what you present as the findings of the study.

Take a thesis or an article presenting a study based on coding procedures. In the section where the findings of the study are presented, you see three interconnected elements that together shape and illustrate a detailed account of the research outcome and the provided knowledge and understandings.

First, you notice the structure of the major and minor themes that have emerged from the process of data analysis. This shapes the basis of the 'organization' and presentation of the findings of the study, possibly in a number of sections (based on major themes/categories) and subsections (based on subthemes/categories).

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Second, this presented organization is accompanied by some kind of 'explanation' of what the different (sub)themes mean to the researcher. These explanations probably include 'discussions' of how each subtheme and theme is related to the research questions, how the different elements of this thematic structure are interrelated, and how they come together to address the research question in general.

Third, this discussion is necessarily accompanied by 'exemplification'. Examples of data extracts and representative pieces from various parts of the landscape of the data are provided to illustrate the discussions and to let the readers understand the researcher's descriptions, become involved in the data analysis process, and make their own inferences about how elements of the data and the emerging thematic structure address the research question and provide new insights and understandings.

A Note on Terminology

A final issue in qualitative research writing that I would like to bring to the attention of beginner qualitative language education researchers—and might be worth taking note of by experienced researchers as well—is about the language of talking, writing, and *thinking* about qualitative research in an atmosphere dominated by quantitative research. Academic research in modern universities has been shaped on the basis of hard science mentalities of experimental studies. Therefore, notions related to various steps of research; the constructs of the meanings and delicate conceptualizations of these notions; and, of course, terms and words that are used to refer to these notions are mainly rooted in experimental research traditions. Within qualitative research traditions many of these terms are re-conceptualized. As mentioned in previous chapters, even the most basic technical terms of research methodology are used tentatively and with a different conceptualization from their quantitative conceptions. (See the notes on the words *data* and *analysis* in the opening paragraphs of Chaps. 4 and 7, respectively.) The straightforward pieces of advice by Taylor et al. (2016, p. 208) about the words *results* and *subjects* hint at such a re-conceptualization: "Do not use results for findings; the term 'results' conjures up images of an experiment. Instead of referring to subjects or respondents, refer to informants, or better yet, people, students, parents, and so on."

Therefore, we need to think about technical terms in research methodology in ways that are *qualitatively* different from quantitative conceptions: what we mean by a research question is basically different in qualitative and quantitative traditions (see Chap. 2); the term design means fundamentally different things in the two traditions (see Chap. 3); and the notions of data as well as analysis are also different in several

important ways. In addition to the consideration that these concepts need to be viewed differently when we think about qualitative inquiry, we also need to be considerate in how we apply them in writing qualitative research. We need to mean what they *mean* within the epistemological and methodological atmosphere of qualitative research, and we also need to *write* in a way that reflects what these terms mean in this context. Ideally, perhaps qualitative research needs to move toward the development of its own set of terminology. Moreover, in writing qualitative language education research, we may additionally be careful about how taken-for-granted terms in the field of language education should be re-conceptualized based on a constructivist and interpretive epistemological position. This may include even the most typical and normalized terms like skills, vocabulary learning, grammar teaching, and so on. (See the section on Conceptualizing Qualitative Questions in Chap. 2.)

Formats and Frameworks

The qualitative writing issues discussed above can be applied in a variety of formats including research proposals, theses and dissertations, research reports, books, book chapters, journal articles, and oral conference presentations. In almost all of these formats, qualitative researchers need to compromise some aspects of radical qualitative research presentation to meet the requirements of established formats and styles. Nevertheless, the qualitative way of research writing *can* be brought into these venues of research presentation (Higgs, Horsfall, & Grace, 2009; Saldana, 2011; Weaver-Hightower, 2019). The following sections include a few notes about three forms of writing in which qualitative researchers are likely to present accounts of their research. In each case, assuming that a particular already-established— probably, quantitative-friendly—template of writing exists, a few pieces of advice are provided for beginner qualitative research writers in writing within the limits of those formats.

Proposals

Like any other piece of writing for institutional purposes, there are two primary considerations about writing proposals for qualitative language education research: first, observe the norms and guidelines which are followed at your institution, and second, see examples of actual proposals written and successfully presented before. These are the bottom lines for formatting the proposal which should come into a dialogue with the general qualitative research writing issues discussed above to create the text of your proposal (Silverman & Marvasti, 2008). The introduction section of a proposal can be based on *textual* references to the literature but in qualitative research proposals, one may expect more of a *contextual* introduction. Then the problem and the significance of tackling it are stated but this might be sometimes

complicated by institutional insistence on separate sections for problem, purpose, and significance of the study. Moreover, the research question should be stated with all its complexities rather than as a simple interrogative sentence. Sometimes part of the load of the research question is carried by other sections not necessarily under a specific section for research questions. In some departments, the issue of stating research hypotheses might become an added headache for qualitative researchers. (See the section From a Topic to a Question in Chap. 2 for more on this.) The section on the proposed research methodology can be the main spot for bringing the prospective qualitative processes together within a format that might be quantitative-friendly. Overall, it is all tentative in research writing in general, but it is perhaps more so in qualitative proposals.

Theses

Reviewing institutional norms and guidelines and reading previously presented works—also advised about proposals above—do hold about theses as well, and perhaps more seriously so. It takes more diligence to master all the mechanics of writing a full thesis and it is obviously more challenging to put the established norms of thesis writing and the spirit of qualitative writing together (Meloy, 2002; Tracy, 2020). However, in the case of writing qualitative theses, too, I can refer to a few major considerations. An introductory chapter—or a few chapters, as per the institutional style—should be devoted to preliminaries that are basically the ones reflected in the proposal. In the literature review, apart from foregrounding the specific theoretical conceptualizations related to the particular language education topic of concern, you may need to provide a review of the literature of your qualitative research methodology as well.

Writers of quantitative theses can take it for granted that the readers know the theoretical bases of their research methods but when you write a thesis based on autoethnography or phenomenology, you cannot expect many people in the field to be theoretically knowledgeable about your research approach. Therefore, the literature review section can help in this regard (Harris, 2020). In addition, a relatively extended chapter on methodology should illustrate the details of your research context, participants, data collection procedures, and data analysis. This is a way to depict your research design which is the counterpart of relatively short sections in quantitative studies that name and quickly sketch a known design. The most extensive part of the thesis is usually shaped by the chapter(s) on your findings, which should include extensive exemplifications and illustrations drawn from your data as well as extended explanations and discussions about them. (See the section above on "Findings and Discussion".) For further illustrations of different aspects of the study, you can heavily rely on appendices at the end of the thesis.

Journal Articles

When it comes to writing journal articles, institutional restrictions may appear to be loosened in the sense that there is much more diversity in formats to be followed. The restrictive role of norms, however, is more or less the same. The overall advice that can be provided to novice writers is to consider a journal whose scope partly matches your language education research issue, and has a record of publishing qualitative studies. Then familiarize yourself with the climate of the journal and see how much you can bring your ideal qualitative writing together with the particular guidelines and the word limit (Gilgun, 2014). Regardless of the specific journal, the basic elements of introduction, theoretical background, methodology (context, participants, data collection, analysis, etc.), findings, discussions, and conclusion are usually needed in any research report. However, the specific organization of these elements, the exact titles and labels, the relative lengths, etc. all depend. Before you actually start writing for a particular journal, read a few recently published qualitative articles of the journal; and remember to *read them as a writer*.

Qualitative (Friendly) Journals

Reporting qualitative studies in the form of articles is intertwined with the issue of publication and this includes knowing the landscape of related academic journals (Loseke & Cahill, 2004; Merriam & Tisdell, 2016). An important aspect of knowing journals related to qualitative (language education) research is about using them as sources of *reading*, but for those who think about publishing their research, it is equally important to be familiar with journals as publication venues for *writing*. Moreover, almost all kind of publishing, specifically including publishing qualitative research in the area of language education, takes some awareness of the *politics* of research and publishing (Mirhosseini, 2018; Toh, 2018). Therefore, in this final part of the book, I introduce two categories of journals: those focusing on theoretical and methodological aspects of qualitative research in general, and journals publishing reports of qualitative studies related to language education research.

Journals of Qualitative Research Methodology

There are several journals that publish articles on various theoretical and methodological aspects of different qualitative research approaches. Rather than focusing on the field-specific content of research in disciplinary areas like education, psychology, or sociology, these journals centrally address various dimensions of the challenges of conceptualizing and conducting qualitative studies in various fields of inquiry. The philosophical and epistemological foundations of qualitative inquiry;

methodological debates about designing, data collection, and data analysis in qualitative research; and a host of related practical considerations are among the issues covered by these journals. The following is a quick introduction of some of these journals (The quotes are from journal websites.):

- ***International Journal of Qualitative Methods*** "is a peer-reviewed open access journal which focuses on methodological advances, innovations, and insights in qualitative or mixed methods studies. The journal was established in 2002 as an eclectic and international forum for papers reporting original methodological insights, study design innovations, and funded-project proposals using qualitative or mixed methods research."
  (https://journals.sagepub.com/home/ijq)
- *Narrative Inquiry* "is devoted to providing a forum for theoretical, empirical, and methodological work on narrative. Articles appearing in *Narrative Inquiry* draw upon a variety of approaches and methodologies in the study of narrative as a way to give contour to experience, tradition, and values to next generations. Particular emphasis is placed on theoretical approaches to narrative and the analysis of narratives in human interaction."
  (https://benjamins.com/catalog/ni)
- *Qualitative Inquiry* "provides an interdisciplinary forum for qualitative methodology and related issues in the human sciences". "The journal publishes open-peer reviewed research articles that experiment with manuscript form and content, and focus on methodological issues raised by qualitative research rather than the content or results of the research."
  (https://journals.sagepub.com/home/qix)
- *Qualitative Research* "is a fully peer-reviewed international journal that publishes original research and review articles on the methodological diversity and multi-disciplinary focus of qualitative research within the social sciences". "The distinctive mission of *Qualitative Research* is to promote and debate qualitative methods in a broad intellectual framework."
  (https://journals.sagepub.com/home/qrj)
- *Qualitative Research Journal* "is an international journal devoted to the communication of the theory and practice of qualitative research in the human sciences. It is interdisciplinary and eclectic, covering all methodologies that can be described as qualitative. It offers an international forum for researchers and practitioners to advance knowledge and promote good qualitative research practices."
  (https://www.emeraldinsight.com/journal/qrj)

Qualitative-Friendly Language Education Journals

There are several journals that specifically publish qualitative studies in certain academic fields. These include *Qualitative Sociology*; *Qualitative Research in Psychology*; *Qualitative Research Reports in Communication*; *Qualitative Research in Organizations and Management*; *Global Qualitative Nursing Research*; *Qualitative Health Research*; and *International Journal of Qualitative Studies on Health and Well-being*. While there is no journal specifically devoted to qualitative language education research, there are qualitative-specific journals in the field of education that can cover language education: *Ethnography and Education*; *International Journal of Qualitative Studies in Education*; and *Qualitative Research in Education*. Moreover, there are journals like *Discourse and Society* and also *Critical Discourse Studies* that publish qualitative language studies in the category of discourse studies but not necessarily language education studies.

Within the field of applied linguistics and language education, the following is a quick sketch of some major journals that do publish a considerable number of qualitative language education studies. Obviously, there is no journal that overtly rejects submissions simply because they rely on qualitative research. More challenging, perhaps, is convincing manuscript reviewers who are unfamiliar with qualitative methods. Therefore, this list is not aimed at specifying journals that accept qualitative studies as distinct from the ones that reject such studies. While I have no claim of comprehensively covering all related journals, the aim of this list is to help beginner researchers find more and more examples of published qualitative studies in the field, and to introduce *some* venues for the publication of their own work.

- *Applied Linguistics* "publishes research into language with relevance to real-world problems. The journal is keen to help make connections between fields, theories, research methods, and scholarly discourses, and welcomes contributions which critically reflect on current practices in applied linguistic research. Applied linguistics is viewed not only as the relation between theory and practice, but also as the study of language and language-related problems in specific situations in which people use and learn languages."
  (https://academic.oup.com/applij)
- *Changing English* "is an established journal for English teachers in primary, secondary and tertiary education. The journal aims to encourage international dialogue between teachers and researchers and to support teachers and schools on issues surrounding literacy and language. In particular, *Changing English* considers the future of English as a subject in the context of its history and the scope for development and change."
  (https://www.tandfonline.com/toc/ccen20/current)
- *Critical Inquiry in Language Studies* "focuses on critical discourse and research in language matters, broadly conceived, that is generated from qualitative, critical pedagogical, and emergent paradigms. In these paradigms, language is considered to be a socially constituted cultural construct that gives

shape to, and at the same time is shaped by, the larger social, political, and historical contexts of its use."
(https://www.tandfonline.com/toc/hcil20/current)

- ***English Teaching: Practice and Critique*** "seeks to promote research and theory related to English literacy that is grounded in a range of contexts: classrooms, schools and wider educational constituencies. The journal has as its main focus English teaching in L1 settings. Submissions focused on EFL will be considered only if they have clear pertinence to English literacy in L1 settings."
(http://www.emeraldgrouppublishing.com/etpc.htm)

- ***International Journal of Bilingual Education and Bilingualism*** "is multi-disciplinary and focuses on all aspects of bilingualism and bilingual education around the world. Theoretical and conceptual analysis, foundational and applied research using qualitative or quantitative approaches, critical essays, and comparative book reviews are all invited. Contributions from varied disciplines are welcome: linguistics, sociology, psychology, education, law, women's studies, history and economics, informatics included."
(https://www.tandfonline.com/toc/rbeb20/current)

- ***Journal of Language, Identity, and Education*** "is an international forum for original research on the intersections of language, identity, and education in global and local contexts". "In order to publish in JLIE, *a study must have a central focus on second, foreign, minority, heritage, or indigenous languages* (or non-standard dialects) and their intersection with either identity and/or education."
(https://www.tandfonline.com/loi/hlie20)

- ***Language and Education*** "provides a forum for the discussion of recent topics and issues in language and literacy which have an immediate bearing upon thought and practice in education. Articles draw important and well-communicated implications from their subject matter for one or more of the following: policy, curriculum, pedagogy or evaluation in education."
(https://www.tandfonline.com/toc/rlae20/current)

- ***Language, Culture, and Curriculum*** "focuses on research into cultural content, literacy or intercultural and transnational studies, usually related to curriculum development, organisation or implementation. The journal also includes studies of language instruction, teacher training, teaching methods and language-in-education policy. It is open to investigations of language attitudes, beliefs and identities as well as to contributions dealing with language learning processes and language practices inside and outside of the classroom."
(https://www.tandfonline.com/loi/rlcc20)

- ***TESOL Journal*** "is a refereed, practitioner-oriented electronic journal based on current theory and research in the field of TESOL. *TJ* is a forum for second and foreign language educators at all levels to engage in the ways that research and theorizing can inform, shape, and ground teaching practices and perspectives. Articles enable an active and vibrant professional dialogue about research- and theory-based practices as well as practice-oriented theorizing and research."
(https://onlinelibrary.wiley.com/journal/19493533)

- **TESOL Quarterly** "encourages submission of previously unpublished articles on topics of significance to individuals concerned with English language teaching and learning and standard English as a second dialect. As a publication that represents a variety of cross-disciplinary interests, both theoretical and practical, the *Quarterly* invites manuscripts on a wide range of topics… It particularly welcomes submissions that address the implications and applications of research."
  (https://onlinelibrary.wiley.com/journal/15457249)

Questions

- *Novice researchers cannot be considered experts on topics of their research. How can we expect them to have their own voice in writing about their research findings on those topics?*

It should be borne in mind that, despite traditional attitudes that might still prevail in academia, finding and expressing one's voice is not necessarily contingent upon gaining recognition as a seasoned researcher, an established figure, or a *name* in the field. In the broad field of education, including language education, the case for constructing, expressing, and hearing learners' voice has already been raised (Bourke & Loveridge, 2016; Quaglia & Corso, 2014; Shahri, 2018). The conception of learner voice can obviously be extended to other groups of people involved in scholarly activities including teachers and researchers. Therefore, even 'research learning' should provide space for beginner researchers to find their voice about what they explore. This can be so even in the process of learning to do quantitative research. In qualitative inquiry, there is explicit added emphasis on researcher voice based on the epistemological foundations and methodological orientations that recognize researcher subjectivity as an integral aspect of research. Such subjectivity is revered regardless of the age and experience of the researcher.

- *Is it not the case that reader involvement and illustrative writing are done in reports of quantitative research, too?*

In quantitative research reports the results of statistical analyses are expected to be portrayed usually relying on tables showcasing various numerical figures. Accordingly, the involvement of the readers in such research reports is limited to an evaluation of how the researcher discusses and interprets these results. The actual process of research and the data largely remain behind the scene. In qualitative research writing, however, there are at least two main distinctive features in this regard. On the one hand, the setting and the participants as well as the details of the data collection process are to be described in detail and explicitly illustrated in order for the audience to be able to visualize the contexts and participants, intimately understand contextual dynamics, and assess the quality of the data collection and

analysis procedures and processes. On the other hand, the presentation of the research findings should necessarily be accompanied by providing ample examples and extracts of data that depict the landscape of data. Such an illustrative approach to data presentation paves the ground for a contextualized understanding of the research process and outcome, and importantly, allows the audience to make their own interpretations, and judge the researcher's judgments and decisions throughout the process of data collection and analysis.

- *Writing within a truly qualitative spirit might be at odds with established norms and formats in mainstream academia, especially in the case of proposals and theses. How can one bring the established formal frameworks and innovative qualitative writing together?*

Ideal qualitative writing should almost always be compromised based on a consideration of existing traditions, norms, formats, and structures. In writing research proposals, theses, and dissertations, the formats come from established institutional norms and in writing journal articles, the editorial policies and publishing traditions of publishers and individual journals set the rules. Therefore, qualitative research writing almost always involves an adjustment of ideal qualitative writing aspirations with some pre-specified requirements that may sometimes be very much in favor of traditional positivist ways of writing. This may imply a constant challenge for the adjustment of one's writing practices between ideals and realities. A specific aspect of such a challenge is the word-limit set by journals for submitted articles. Writing qualitative research requires rather extensive descriptions and explanations that can exceed the normal word limits of articles published in academic journals. Qualitative researchers may frequently find such limits quite irritating as they usually need to write more than traditional statistical research reports in order to describe the details of their research methodology and their findings. They may need to tackle the challenge of publishing their research in journals that sometimes set word limits as low as five or six thousand words. Sometimes, negotiations with journal editors might be helpful in making concessions about qualitative articles.

- *Is there any typical format to adopt and follow when writing qualitative research papers?*

Regardless of the format and venue of publication, almost all research reports include the following elements: a general introduction or background section; some discussion of the theoretical background and basis of the study; the methodological details about the context, participants, data collection, and data analysis; the findings of the research; discussion of the findings; and a concluding section. Apart from this broad picture of a research report, the details need to be set based on the norms and formats of the particular journal and the extent to which the norms can be manipulated or negotiated. The details of the organization, length, style, formatting, etc. of journal articles should almost always be fine-tuned based on the consideration of journal guidelines, samples of their recently published articles, and possibly negotiations of specific points with journal editors.

- *While there are specific journals devoted to qualitative studies in areas of education, sociology, psychology, etc. why is there no such journal in the specific area of applied linguistics and language education? Is there any prospect for the launch of such a journal?*

As I have argued before, "no specifically-qualitative journal is published in the area of language education. It is true that there is no such journal carrying the word quantitative in its title either, but there are journals working on the basis of a covert quantitative-oriented policy of publication." (Mirhosseini, 2017, p. 2) Considering this, in addition to the collective attempts of qualitative researchers in the area of language education for gaining more recognition through increased publication of their research in the existing journals, one further endeavor might be launching journals specifically publishing qualitative studies in the field. This might be a viable undertaking but cannot replace the widespread publication of qualitative research in the mainstream journals of applied linguistics and language education. Specific journals of qualitative research in language education are fine and can be a welcome initiation but too much emphasis on such an endeavor may itself cause the marginalization and cornering of qualitative language education research to the confinement of their own journals.

Further Reading

- **Ely, M., Vinz, R., Anzul, M., & Downing, M. (1997).** *On writing qualitative research: Living by words*. **London: The Falmer Press.**

The audience that the authors have in mind include beginning and emerging qualitative researchers who should naturally engage in writing about their research sooner or later. Heavily relying on their own research and writing experiences, and intimately *talking* to their readers, Ely and her co-authors state: "We are writing to people who see themselves as ongoing learners of qualitative research" (p. 2). After an introductory chapter, the book turns to some preliminary thoughts about purposes and justifications for writing and some conceptual foundations of meaning making in writing and then to some basic formal and rhetorical aspects of research writing. In addition to other discussions, two specific chapters in the book deal with analytical and interpretive modes of writing in reporting qualitative research. In these two chapters, the authors focus on writing about qualitative data analysis and explaining procedures of data coding and categorization, and on interpretation and theory generation.

- **Woods, P. (2006).** *Successful writing for qualitative researchers* **(2nd ed.). London: Routledge.**

Woods starts his book with a chapter quickly sketching some characteristic features of qualitative inquiry and then proceeds to the act of qualitative research writing. The following chapter covers some broad considerations that may be viewed as general preparations for any type of writing, including the writing of qualitative research reports. Two chapters specifically address usual issues of planning,

organization, and presentation in writing; one discussing typical tips and tricks in more or less known forms, and one turning to alternative approaches that may be more vibrant and, therefore, compatible with the climate of qualitative inquiry. Shifting back to the practical challenges, the author devotes two chapters to issues of style and editing, which focus on the rhetorical structuring of texts and the process of fine-tuning and polishing them, respectively. The book also addresses collaborative writing, the use of computers in the actual process of writing, and the publication of research writing.

- **Golden-Biddle, K., & Locke, K. (2007).** *Composing qualitative research* **(2nd ed.). London: Sage.**

The authors' introduction to this book starts with a few telling questions about qualitative research writing: "What do I want to write about? On which aspects of the data do I focus? How do I construct a compelling argument? …How do we convey the meaning of our work – its significance and import – so that it resonates with readers?" (p. 1) In addressing these major questions, Golden-Biddle and Locke organize the five main chapters of their book around the idea of noticing, understanding, interpreting, narrating, and reporting storylines. The first chapter discusses some general concern and frameworks of thinking about writing qualitative research reports. In the next three chapters, the authors focus on storylines and how they can be planned, developed, and actually told in the form of a journal article. In the fifth chapter and before the conclusion, preparing a text for publication as well as editorial and refereeing processes are addressed.

- **Holliday, A. (2007).** *Doing and writing qualitative research* **(2nd ed.). London: Sage.**

The book comprises eight chapters, four of which are about 'doing' qualitative studies and the other four about 'writing' research reports. Each chapter starts with relatively beginner-friendly discussions and then proceeds to some sociocultural complexities of qualitative inquiry. The first group of chapters deal with concerns like theoretical foundations of qualitative research, finding research questions, designing qualitative studies, and data collection. In the second set of chapters, Holliday turns to writing about qualitative studies and discusses four major categories of issues: the organization and presentation of data and discussing what the researcher understands out of data explorations; encountering the so-called writing conventions and how researchers can find, construct, and express their own voice in writing about their research; the relationship between the researcher and the research context, and reliance on researcher reflexivity and subjectivity as a source of understandings; and the meaningfulness and appropriateness of 'claims' in qualitative research writing.

- **Yin, R. (2011).** *Doing qualitative research from start to finish*. **New York: Guilford Press. (Part III.** *Presenting the results form qualitative research*)

This third major part of Yin's book includes two chapters: one on 'Displaying qualitative data' and the other on 'Composing research to share it with others'. In the

chapter on displaying, the author elaborates on the challenges created by the mostly verbal rather than numerical nature of qualitative data. Issues of organizing, presenting, and explaining narrative data excerpts; tabular, graphic, and pictorial ways of presenting qualitative data; and preparing presentation slides are discussed in this chapter. The chapter on composing pursues the broad aim of communicating qualitative studies to specific groups of audience either in the oral or written form. Yin presents this chapter in several sections that address some 'general hints' about presenting research; considerations regarding the presentation and representation of the contextual complexities of research; some practical and technical aspects of the actual process of writing; and the reflective and interpretive aspects of research writing.

- **Gilgun, J. F. (2014).** *Writing up qualitative research*. **In P. Leavy (Ed.),** *The Oxford handbook of qualitative research* **(pp. 658–676). Oxford: Oxford University Press.**

Gilgun's chapter concentrates on reporting studies based on various qualitative approaches in the form of journal articles. Relying on her experiences of writing and reviewing qualitative journal articles, she starts with discussions of some 'general principles' about the importance of reflecting the data and the representation of research participant's voice in qualitative articles. These general discussions also address the relevance of sample size as well as the quality of data collection and analysis to the writing process. The chapter then turns to writing considerations with regard to various sections of a typical journal article. Although the author does mention that "there are no rigid rules about how to write journal articles based on qualitative research, [and] much depends on the methodological perspectives, purposes of the research, and the editorial guidelines of particular journals" (p. 664), she covers typical sections of 'Introduction, Methods, Findings, and Discussion' in this part of the chapter.

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