

Title: Foundations of Qualitative Methods

Instructor: A. Vinson

Full Course Description

Qualitative methods allow us to investigate people's lived experience and learn about how individuals make meaning out of their activities in everyday life. This course will focus on the two most commonly used qualitative methods: ethnographic fieldwork and in-depth interviewing. Students will have a chance to practice these methods, to learn about their epistemological foundations, and to discuss how the affordances and limitations of these methods shape knowledge-making in social research.

Learning objectives

By the end of this course, students should be able to: 1. Explain the limitations and affordances of ethnographic fieldwork and in-depth interviewing methods 2. Collect and analyze original data with a team of peers 3. Write a qualitative research report that includes a methods section that justifies design and procedural choices in the research process, presents analyzed qualitative findings, and demonstrates self-reflection on the research process and researcher positionality

What motivates the need for the proposed course and how will it fill gaps in the HILS curriculum? This justification may draw on HILS program objectives and/or AHRQ competencies for learning health sciences.

DLHS does not currently offer qualitative methods courses for HILS students. This course will allow qualitative methods to be taught in house. AHRQ Competencies that this course can contribute to developing in HILS students: 1. Research Methods. To conduct research within the context of complex health systems using appropriate study designs and analytic methods to assess outcomes of interest to health systems stakeholders. 2. Ethics of Research and Implementation in Health Systems. To ensure that research and quality improvement done in health care settings adheres to the highest ethical standards. 3. Engagement, Leadership, and Research Management. To engage stakeholders in all aspects of the research process and effectively lead and manage LHS research teams and projects.

NOTE from Alexandra: I have annotated this syllabus for them by including the lecture/discussion topics that I will use to structure my lesson planning. These will not appear in current form on the student version of the syllabus. I'll be glad to share more details about the lesson planning with the committee, although I have obviously not written all of the lectures and designed all of the in-class exercises yet.

Foundations of Qualitative Methods
Health Infrastructures and Learning Systems
Department of Learning Health Sciences
Alexandra Vinson, PhD

Course Description

Qualitative methods allow us to investigate people's lived experience and learn about how individuals make meaning out of their activities in everyday life. This course will focus on the two most commonly used qualitative methods: ethnographic fieldwork and in-depth interviewing. Students will have a chance to practice these methods, to learn about their epistemological foundations, and to discuss how the affordances and limitations of these methods shape knowledge-making in social research.

Learning Objectives

By the end of this course, students should be able to:

1. Explain the limitations and affordances of ethnographic fieldwork and in-depth interviewing methods
2. Collect and analyze original data with a team of peers
3. Write a qualitative research report that includes a methods section that justifies design and procedural choices in the research process, presents analyzed qualitative findings, and demonstrates self-reflection on the research process and researcher positionality

Assessment

Learning qualitative methods is an active pursuit. Your engagement is essential in all phases of the course. Our seminar will be enriched by your contributions, so please be prepared to participate in class discussions, support your peers, and share your questions and ideas. This is the breakdown for how your performance will be assessed in this course:

Homework and Preparedness for Class – 35%

Participation in Class Discussions and Group Work – 35%

Final Paper – 30%

Final Paper

At the end of the semester, you must submit a 15-20 page paper that will report on the research project you completed during the course. The paper will consist of: (1) a description of your research site or case, the people found there, and the questions that you approached the site/case with. (2) A brief methods section that describes how you collected your data and why you made the methodological choices you did—including how access was secured, how rapport was built with informants, and what steps were taken to minimize the loss of data. This section should be informed by class readings and discussions. (3) A preliminary findings section in

which you select two themes/analytic categories from your analysis, explain the significance of these themes for understanding the activity of your field site/research participants, and speculate on the ways in which each theme may be “a case of” a more generalizable social process. (4) Finally, your paper must include a reflexive account of your role in the field/as an interviewer and how it changed over the semester, how your research questions were shaped and altered as your data collection progressed, ethical problems encountered through the research, and future directions for your project.

Course Texts

In addition to selected articles, we will read selections from the following texts in this course. Individual chapters will be provided for you in Canvas/Dropbox, but the full citations are here for your reference.

Emerson, R., R. Fretz & L. Shaw (2011). *Writing Ethnographic Fieldnotes, Second Edition*. Chicago: University of Chicago Press.

Gerson, K. & S. Damaske (2020). *The Science and Art of Interviewing*. New York: Oxford University Press.

Jerolmack, C. & S. Khan, Eds. (2017). *Approaches to Ethnography: Analysis and Representation in Participant Observation*. New York: Oxford University Press.

Lareau, A. (2021). *Listening to People: A Practical Guide to Interviewing, Participant Observation, Data Analysis, and Writing It All Up*. Chicago: University of Chicago Press.

Luker, K. (2010). *Salsa Dancing into the Social Sciences: Research in an Age of Info-Glut*. Cambridge, MA: Harvard University Press.

Maxwell, J. (2004). *Qualitative Research Design: An Interactive Approach, 2nd Ed.* Newbury Park, CA: SAGE Publications.

Rubin, A. (2021). *Rocking Qualitative Social Science: An Irreverent Guide to Rigorous Research*. Redwood City, CA: Stanford University Press.

Small, M & J. Calarco (2022). *Qualitative Literacy: A Guide to Evaluating Ethnographic and Interview Research*. Oakland, CA: University of California Press.

Timmermans, S. & I. Tavory (2022). *Data Analysis in Qualitative Research: Theorizing with Abductive Analysis*. Chicago: University of Chicago Press.

Course Overview

Week 1: Why Qualitative Research?

Readings:

Dixon-Woods M, Leslie M, Bion J, Tarrant C. (2012). "What counts? An ethnographic study of infection data reported to a patient safety program." *Milbank Quarterly*, 90(3):548-91.

Before class, think about what aspects of this paper appeal to you (or not), what surprises you, and what leaves you with questions. Bring one question to class to keep the discussion going.

Lecture/Discussion Topics:

1. Course Introduction
2. In-Class Exercise & Guided discussion of papers
3. Connecting these papers to the themes of the course. Brief discussion of topics to be covered and how performance will be assessed.

Week 2: The Search for Truth: Epistemological foundations of qualitative research

Readings:

Rubin, A. (2021). "Topo: What exactly are qualitative methods?" in *Rocking Qualitative Social Science: An irreverent guide to rigorous research*. Redwood City, CA: Stanford University Press.

Lecture/Discussion Topics:

1. Lecture and discussion on epistemological foundations and traditions of qualitative research
2. What underlying principles unite these various traditions?
3. In-class exercise: "Finding Your Research Idea"

Week 3: Developing Research Questions and Selecting Cases

Readings:

Kristin Luker, "Appendix One: What to do if you don't have a case" (pp. 229-232), in *Salsa Dancing into the Social Sciences: Research in an Age of Info-Glut*. Cambridge, MA: Harvard University Press.

Maxwell, J. (2004). "Research Questions: What do you want to understand?" *Qualitative Research Design: An Interactive Approach*, 2nd Ed. Newbury Park, CA: SAGE Publications.

Lecture/Discussion Topics:

1. Identifying different types of gaps in the literature; different justifications for doing qualitative work
2. Designing qualitative research questions
3. The logic of case selection

Week 4: Finding an Entry Point in the Literature

Lecture/Discussion Topics:

In-class group presentations of team research projects

Week 5: Study Design

Readings:

Lamont, M. & A. Swidler. "Methodological Pluralism and the Possibilities and Limits of Interviewing."

Jerolmack, C. & S. Khan. (2017) "Introduction: An Analytic Approach to Ethnography," in *Approaches to Ethnography*, Eds. Jerolmack & Khan.

Timmermans, S. & I. Tavory (2022). "Collecting." *Data Analysis in Qualitative Research: Theorizing with Abductive Analysis*. Chicago: University of Chicago Press.

Lecture/Discussion Topics:

Discuss the debate between ethnographers and interviewers. What types of research questions are best answered by each method? Where do these methods converge/diverge?

Week 6: Data Collection: Interviewing

Readings:

Small, M. (2009). "'How many cases do I need?' On science and the logic of case selection in field-based research."

Rinaldo, R. & J. Guhin (2019). "How and Why Interviews Work: Ethnographic Interviews and Meso-level Public Culture"

Gerson, K. & S. Damaske, "Constructing an Interview Guide: Creating a Flexible Structure" **and** "Conducting Interviews: Seeking Discoveries that Matter" in *The Science and Art of Interviewing*. New York: Oxford University Press.

Lecture/Discussion Topics:

1. Development of interview questions and guides
2. Sampling and saturation in interview research
3. The nuts and bolts of interviewing

Week 7: Data Collection: Observation

Readings:

Lareau, "Learning to do Participant Observation: A practical guide" **and** "Writing High-Quality Fieldnotes: Details Matter" in *Listening to People*.

Lecture/Discussion Topics:

1. Nuts and bolts of observations
2. From jottings to field notes
3. A brief note on field interviews

Week 8: Aligning Method and Study Design

Readings:

Tavory & Timmermans (2012) "Two Cases of Ethnography: Grounded Theory and Extended Case Method," *Ethnography*, 10(3):243-263.

Gerson & Damaske, "Depth Interviewing as Science and Art" in *The Science and Art of Interviewing*. New York: Oxford University Press.

Lecture/Discussion Topics:

1. Research updates from teams
2. Discussion of how readings shape next steps in data collection

Week 9: Research ethics for qualitative research

Readings:

Salzinger, L. & T. Gowan, "Macro Analysis: Power in the Field" in *Approaches to Ethnography*, Eds. Jerolmack & Khan.

Lareau, A. "Appendix to Chapter 3," in *Listening to People*. (pp. 271-277)

Gary Alan Fine, "Ten Lies of Ethnography."

Lecture/Discussion Topics:

1. Researcher transparency
2. Recruitment and consent
3. Positionality, power and boundaries
4. Navigating the IRB

Week 10: Adapting Classical Methodological Approaches to Study LHSs

Readings:

Star (1999). "The Ethnography of Infrastructure." *American Behavioral Scientist*, 43(3): 377-391.

M Dixon-Woods (2003). "What can ethnography do for quality and safety in health care?" *BMJ Quality & Safety*.

Lecture/Discussion Topics:

1. How institutional constraints may shape research design: small interview studies, rapid ethnographic research and collaborative qualitative work
2. Using qualitative methods to study learning health systems
3. Team updates on fieldwork/interview progress

Week 11: Data Analysis & Generating Findings

Readings:

All students read Duneier and Lareau. Interviewers read Gerson & Damaske. Ethnographers read Emerson, Fretz & Shaw.

Duneier (2011) "How Not to Lie with Ethnography," *Sociological Methodology*, 41:1-11.

Lareau, "Data Analysis: Thinking as You Go" in *Listening to People*.

Gerson & Damaske, "Analyzing Interviews: Making Sense of Complex Material," in *The Science and Art of Interviewing*.

Emerson, Fretz & Shaw, "Processing Fieldnotes: Coding and Memoing" in *Writing Ethnographic Fieldnotes*.

Lecture/Discussion Topics:

1. The qualitative orientation to data analysis
2. Group presentations (ethnographers present on writing fieldnotes, interviewers present on handling interview data)
3. Computer-assisted qualitative data analysis software and the qualitative coding process

Week 12: Theory Development: Interpretation, Inference & Generalizability

Readings:

Timmermans & Tavory (2012) "Theory Construction in Qualitative Research. From Grounded Theory to Abductive Analysis." *Sociological Theory*, 30(3):167-186.

Rubin, "Placing Pro: Making Causal Claims with Qualitative Data" in *Rocking Qualitative Social Science: An Irreverent Guide to Rigorous Research*.

Lecture/Discussion Topics:

1. Inferential thinking in qualitative research
2. The role of theory in interpretation
3. Thinking about validity in qualitative research

Week 13: Reporting Qualitative Findings

Readings:

Timmermans & Tavory, "Writing it down, writing it up" in *Data Analysis in Qualitative Research*.

Lareau, "Writing: Becoming Clearer about Your Contribution" in *Listening to People*.

Gerson & Damaske, "Pulling it All Together: Telling Your Story and Making Your Case" in *The Science and Art of Interviewing*.

Lecture/Discussion Topics:

1. Writing as the final stage of analysis and theory development
2. Reporting conventions in qualitative research, including reflexivity and positionality
3. Qualitative research and the open science movement

Week 14: Evaluating the Quality of Qualitative Research

Readings:

All students read Calarco & Small, "Introduction" in *Qualitative Literacy: A Guide to Evaluating Ethnographic and Interview Research*.

Groups of students will read one of the 5 chapters describing Calarco & Small's quality criteria.

All students read Ashley Rubin, "Living on the Sharp End: Dealing with Skeptics of Qualitative Research" in *Rocking Qualitative Social Science: An Irreverent Guide to Rigorous Research*.

Lecture/Discussion Topics:

1. Group presentations on Calarco & Small, discussion of evaluating quality in qualitative research
2. Dealing with skeptics as a qualitative researcher
3. How to peer review qualitative articles

Week 15: Final Presentations