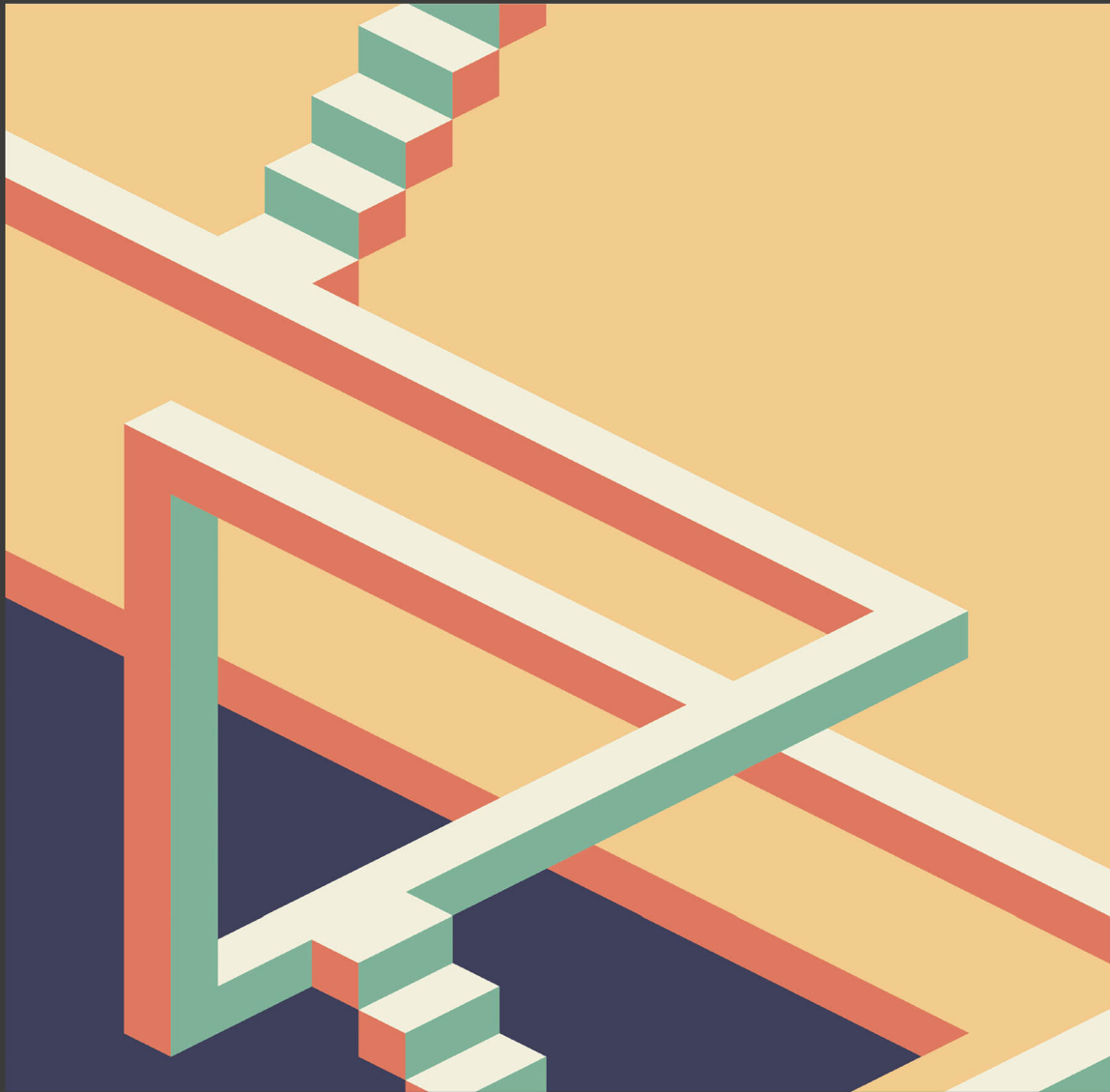


# Interpretive Description

## Qualitative Research for Applied Practice

SALLY THORNE



Third Edition

DEVELOPING QUALITATIVE INQUIRY



# INTERPRETIVE DESCRIPTION

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**Sally Thorne** is a Professor Emeritus in the School of Nursing at the University of British Columbia, Canada. She is editor-in-chief of the journal *Nursing Inquiry*.

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# INTERPRETIVE DESCRIPTION

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Applied Practice

Third Edition

*Sally Thorne*

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## ABOUT THE AUTHOR

**Sally Thorne**, RN, PhD, DSc (Hon), FAAN, FCAHS, FCAN, and CM, is Professor Emeritus at the University of British Columbia School of Nursing in Vancouver, Canada. The primary emphasis of her research career has been exploring how structural and attitudinal aspects of contemporary health care systems shape the illness experience of persons affected by chronic conditions and cancer. Her more recent studies address the evolving social context of end-of-life care, including medical assistance in dying. Dr Thorne has made a major contribution to qualitative research by developing interpretive description as a methodological option for those whose research reflects the aspirations of applied disciplines, including the health and social service professions. She is a widely published scholar and author, serves as editor-in-chief for *Nursing Inquiry*, a journal dedicated to the ideas affecting nursing and health care, and is a passionate educator and mentor. By virtue of her expertise on the nature of knowledge for applied practice, she is internationally sought after as a qualitative methodological consultant.



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# PREFACE

Since the first edition of *Interpretive Description* was published in 2008, there has been an explosion of interest in using qualitative approaches to meet the complex and evolving knowledge needs of the applied and practice disciplines. Much of the historic qualitative methodological tradition derived from the theorizing needs of the social sciences. While certain techniques from those classic methods remain useful within current applied research, the applied disciplines—disciplines whose mandate is action in the world—have recognized the value inherent in drawing upon their own disciplinary epistemologies rather than “borrowed” theories to generate the kinds of findings that provide better answers to their research questions and allow for the development of knowledge forms that can be put to use by the applied and practice world.

Interpretive description is a strategy for excavating, illuminating, articulating, and disseminating the kind of knowledge that disciplines with an application mandate tend to need in order to enact their particular contribution to the universe, whether it be healing, educating, serving, or building something on behalf of society. Such work is fundamentally complex and messy, often representing the kinds of wicked problems that defy formal theorizing and demand instead a multiplicity of insights and perspectives, examined intersectionally within increasingly dynamic contexts. These are exciting times for thinking about the nature and application of knowledge, and the disciplines that exist for the purpose of applied action require strategic approaches to ensuring their research endeavors are meaningful and applicable.

Interpretive description refuses to sit firmly upon any endpoint on the binary scale of objective reality versus subjective impression. Instead it tends to find itself in the precarious middle ground, drawing upon the full spectrum of factual

material and social construction to build meaningful understandings of the ideas that are of central importance to the applied disciplines such as education, community development, human geography, and the health professions. In the more critical realist tradition of working in the realm of open systems, where the potential to create tendencies becomes a more accurate representation of how the world works than is depicted in a more conventional sense of causal relationships (Bhaskar, 1989; Groff, 2004), research that helps us unpack how things seem to engage with one another, and how such entities as structure and agency play out in human experience, makes far better sense in practice than would the more determinate or definitive explanations (Clark, Lissel, & Davis, 2008). For those whose disciplinary mandate requires informed action, practicing within the confines of an admittedly imperfect knowledge base is familiar territory. While many elements of our work may be bolstered by conventional scientific knowledge, much that has to do with the human experiential and behavioral world of applied practice requires a distinct form of inquiry—one that is well informed by what is known on the basis of current ways of understanding, and one that is always evolving toward better and more effective ways of enacting that which the discipline seeks to achieve. It is an optimistic, critically reflective, interpretive kind of knowledge, a seeking out of alternative claims and testing out the possible effects of their implementation. As such, it reflects a kind of normative moral direction, driven by a fundamental belief in the rightness of striving to find better ways to serve our disciplinary purposes and the potential of research to guide us there. It is this kind of applied disciplinary knowledge toward which we turn our attention in this book.

## **Origins**

I feel inordinately fortunate to have found my way into a professional discipline such as nursing. Because it concerns itself with the general human health and illness experience at levels ranging from the cellular to the global, while devoting the vast proportion of its emphasis upon the everyday reality of actual and particular people within their own unique circumstances, nursing indelicately straddles the social and biomedical sciences for methodological direction. The research questions nurses ask set the stage for the work they and their interprofessional team partners will do to diminish suffering, ameliorate distress, accommodate bodily dysfunction or frailty, buffer conditions that exacerbate health vulnerabilities for those made marginal by society, and make meaningful sense of the myriad of indignities that life has in store for our bodies and minds. Posed from the framework of a profession so intimately engaged in the mundane and corporeal aspects of health and illness, such questions expose those elements of human experience that will help improve our understanding of health and illness within their full complexity, optimize the care we are able to provide, and

ultimately serve the aspirations of our society for a system of care for those in need. The business of nursing is both vibrant and immediate, having to do with applying patterned knowledge about persons in the most general sense to the decidedly unique and particular circumstances of the one who sits before you today (Thorne & Sawatzky, 2014).

The knowledge that is required in order to advance a profession such as nursing is inherently multifaceted, complex, and diverse. Nurses require reason, philosophy, and science in equal measure, as well as theoretical structures within which to organize and synthesize vast bodies of information so that they can inform plans of action applicable to an infinite variety of changing circumstances. Nurses also depend on a vast quantity of practical knowledge to translate the ideas that result from such syntheses into the actual “doing.” These features of how ideas work have been a mixed blessing over the discipline’s modern history. While nursing’s propensity to understand individual experience in context has limited its capacity to advance a more traditional and formal correlational and propositional science, it has also catalyzed the profession into seeking alternative systematic and rigorous mechanisms by which to uncover understanding and build a coherent and dynamic knowledge base. It seems, therefore, no accident that nursing has played such a strong leadership role in the evolution of qualitative methods for applied health research in recent generations.

The methodological approach that this book addresses reflects one particular development in the application of qualitative research approaches to the specific kinds of problems that the applied disciplines such as nursing are inclined to raise. It became apparent to nursing during the 1980s that the discipline needed a research method distinct from the more theoretically driven available social science knowledge development approaches (Thorne, 2011). Attempts to adhere rigorously to the tenets of grounded theory, phenomenology, and ethnography were creating an increasingly obvious tension associated with the discipline’s requirement for “useable” knowledge (Thorne, 2020a). It wasn’t that nurses were incapable of understanding or following the rule structures of the methodological traditions they were trying to adopt, but rather that there were subtle yet powerful distinctions between the intellectual projects for which those methods had been created and those of an applied health field. Because qualitative science has been such a “poor cousin” of the more mathematically grounded empirical traditions in health research, inadequately justified adaptations to existing methods were not an option. Rather, what was needed was a way of thinking through qualitative research logic in relation to a range of distinct kinds of disciplinary questions in a manner that could be both credible and defensible. It was to address this context that the approach we now refer to as “interpretive description” was conceived. And while the ideas may have been inspired by the distinctive knowledge challenges facing nursing, it has become increasingly apparent over the years that the idea of using applied disciplinary logic to

steer methodological choices is equally applicable to a wide range of distinctive disciplinary and professional mandates, not only in the health fields but also in other fields who see themselves as action oriented. While I may draw on clinical examples from the health field as a primary tool to illuminate the issues of concern within this conversation, readers are enthusiastically encouraged to draw from it that which has relevance for their own species of the broader spectrum of what it means to be working with ideas across disciplines whose fundamental sensibility is directed toward action.

This book is organized as a guide to both new and more seasoned researchers from applied disciplines as they work through the iterative steps of conceiving, designing, and implementing coherent studies that are capable of generating new insights about relevant human phenomena in their own field. Although familiarity with the methodological traditions upon which interpretive description was built can be an asset in sharpening one's understanding of which aspects conform to or depart from some of the more conventional methods, I am confident that it can also effectively serve the needs of neophyte scholars who are building their qualitative methodological logic upon a foundation of understanding the nature of knowledge as it works within their applied discipline. Interpretive description seeks to illuminate the epistemological underpinnings and methodological consequences required of a research perspective that will make practical sense to an intended disciplinary audience and generate findings that are both credible and useable. Drawing thoughtfully upon some of the best analytic maneuvers that phenomenology, ethnography, grounded theory, naturalistic inquiry, and other classic qualitative approaches have to offer, it attempts to illustrate an organizing logic that guides researchers through the intricate sequence of study design and implementation to generate a form of research findings that hold true to their inherent limitations and are meaningful and applicable to their disciplinary and professional audiences. It articulates a beginning-to-end reasoned approach to knowledge development for applied researchers curious to learn more about some subjective or experiential aspect of their world within its natural context and seeking to expand their discipline's capacity to take up these new insights in the world of applied practice.

### **How to Use This Book**

This book is structured in such a manner that it can be used by neophyte qualitative researchers as a "project coach," methodically working through the kinds of challenges and dilemmas that investigators typically encounter at various stages along the way and helping you develop confidence in the rationale for the choices you make. It can also serve as a companion to more seasoned qualitative researchers exploring methodological variations, modifications, and refinements within familiar approaches—a kind of consultation between virtual colleagues

such as I have benefited from with so many of the great authors in this genre over the years. It is therefore written not as a prescriptive “how to” but rather as an invitation to ask oneself the difficult questions that inevitably arise in studies designed in the service of applied and practice questions and to find credible and defensible answers for them.

Graduate students, newer researchers, and established quantitative researchers who are attempting to expand their repertoire into the qualitative inquiry domain will find it comforting to have a resource with which to scrutinize the organizing logic of their evolving project in accordance with general credibility standards against which they can test and confirm their methodological reasoning. Typically, people find their way into interpretive description as an option when the “classic” qualitative methods available to them aren’t quite fitting the needs of their particular applied research question. Having reached that point, they are probably already well on their way to developing a critically reflective lens in relation to research design choices, and it is that very thoughtfulness this book intends to encourage. Although each of the chapters focuses on a distinct element in the conceptualization and implementation of research, few offer explicit “how to” directions. Thus, for those seeking a recipe for a quick and easy formulaic study, interpretive description will not be the resource of choice. In contrast, researchers wishing to generate a rigorous and credible methodological approach that can do justice to the specific nature of the applied questions that intrigue them will find in this book a dialogue between author and reader in support of rigorous and logical decision-making throughout all phases of the research project. Within the framework of interpretive description as a method, the chapters will provide guidance toward a product that has both empirical integrity and disciplinary utility.

Since most researchers consult texts at the point of beginning to generate a research proposal, Part I of this book focuses on design decisions and preliminary logic. Part II speaks to the researcher who is beginning to enter the field, shifting from the grand design to the complicated processes associated with putting that vision into action. Part III focuses on the intellectual demands of making sense of the data one has gleaned from the field and generating credible analytic claims about it. As seasoned researchers will know, it is difficult to fully appreciate the demands of each phase of a project until you are immersed in it. Even the most exquisitely articulated research proposal does not really prepare you for the “feel” of being overwhelmed with data or getting caught up in the complexity of your findings. Therefore, this book is envisioned as an ongoing conversation to guide you as you progress through your own studies so that you can begin to predict the twists and turns along the way and make effective choices when you encounter those inevitable crossroads.



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# ACKNOWLEDGMENTS

In my personal trajectory of coming to understand what it means to hold a methodological logic within the philosophical framework of an applied health discipline, I have been privileged with an extraordinary set of mentors over my career. From my first venture in graduate studies, Rose Murakami and Margaret Campbell taught me that thinking as a nurse derives from a fundamental set of philosophical assumptions and positionings that deserve careful intellectual attention. Joan Anderson enticed me into the world of qualitative inquiry, recognizing its potential for illuminating some of the intriguing contextual aspects that quantitative research approaches would have stripped away. In my subsequent graduate study adventures, Juliene Lipson, Hal Kirshbaum, and Elvi Whittaker invited me to enter more fully into an appreciation for the pragmatics and politics of method within the social science universe—allowing a standpoint outside of my comfortable disciplinary home. And in subsequent years, sustained and often intense dialogue with brilliant colleagues, including Margarete Sandelowski in particular, has held me to a fidelity of purpose about matters of method and methodology. The preface Sandelowski contributed to this book’s first edition helped confirm the relevance and credibility of the interpretive description methodological project. If anything I have learned is of worth to others, it is because these intellectual giants have allowed me to engage in and challenge their thinking and push my own understanding at every juncture.

I also owe a sincere debt to the dozens of graduate students who have, over the years, engaged with and wrestled with these methodological issues—both graduate students under my direct supervision and also those colleagues from other parts of the globe with whom I have corresponded and collaborated. I have learned so much from all of your questions and your struggles and been continually inspired by your aspirations to “do method” in a manner that reflects

the integrity of whatever disciplinary logic you bring to your own inquiries. In particular, I'd like to acknowledge a few of those who have been such an important feature of my own development as a scholar. Sheryl Reimer Kirkham was among the group of graduate students who co-authored the original interpretive description papers, and many others over these years have joined with me in wrestling through methodological intrigues, including Tracy Truant, Jennifer Stephens, Charlotte Handberg, Jay Lee, Patrick Chiu, Victoria Félix, and Mia Ocean, each of whom has contributed their own distinctive insights and contextual understandings to the growing body of interpretive description methodological literature. And for the many more colleagues across the career spectrum whose insightful reflections in the context of their own methodological machinations have expanded my own thinking immeasurably over these years, I have so enjoyed observing the unfolding of the story of interpretive description through the perspective of your fine minds.

The international qualitative health research community is a rich and diverse one, including a wide range of genuine "characters" and events. Because we have so often over the years had the opportunity for lively dialogue and engagement at conferences, workshops, and training sessions, we have come to know one other, to push each other's boundaries, and to keep tugging away at the intellectual underpinnings of what we are doing to look more deeply into what becomes possible. From that rich scholarly community, I have benefited from many longstanding scholarly alliances. And I want to especially acknowledge my colleagues at the University of British Columbia School of Nursing, as well as each of my research partners and co-authors over a long and happy research career (so far). Your excellent contributions to my methodological thinking are well documented in the history of our various writing collaborations. And finally, I would like to extend a special word of tribute and gratitude to Jan Morse, whose tenacious leadership and persistent optimism that the field of qualitative health research was worth advancing have kept this community dynamic and alive.

## **Limitations**

In a work such as this, the ideas and thoughts that come into the writing derive from years of conversations with oneself and others. Because the world of qualitative study is so incredibly diverse and complex, and because so much has been written about various aspects of it, a commentary such as this one does an injustice to the many important ideas that are omitted, glossed over, or oversimplified as part of another argument. Unless this book became a historical study of the rich traditions upon which modern qualitative health research had been developed, it could not possibly have noted each of the thinkers and writers whose work has informed me over the years. Although some of those greats are acknowledged through formal citation, many equally profound contributors will have been missed in a document whose primary purpose is methodological guidance.

What remains, then, are the thoughts of one individual scholar, presented in the context of a smattering of the relevant background to position these thoughts within a larger context of evolving ideas and a good deal of opinion based on extended experience. Where toes are stepped on, contradictory claims left dangling, or half-baked arguments pontificated as if they were fully formed profound pearls of wisdom, I take full and humble responsibility.



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**PART I**

**Interpretive Description  
in Concept**



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# 1

## QUALITATIVE RESEARCH IN THE APPLIED DISCIPLINES

### Theorizing and Application

Many years ago, I had the experience of engaging in a week-long intensive workshop on the confluence of genetics and ethics with a group of academics, composed of roughly equal numbers of social scientists and health professional researchers. Although everyone was highly enthusiastic about the topic, fundamental schisms began to form quite early in the week between the two groups, such that by the end of our time together there seemed an insurmountable barrier to understanding. Essentially, for the clinician researchers, the reason one engaged in a quest for knowledge was to apply it to real human beings caught in complex and difficult human health problems so that their quality of life could be improved in some manner. In contrast, for the social scientists, the point of knowledge development was theorizing, and it was anathema to them that people would put their ideas into use prematurely. While I fully recognize that many clinicians theorize and many social scientists do applied work, it seemed that the extreme situation of working together so closely on this particular topic had revealed a polarizing tendency that I had not previously appreciated in its full blossom. While that singular episode is a departure from so many of the vibrant interdisciplinary collaborations to which I have subsequently been party, the underlying problem stayed with me, and the insights arising from it began to feature in my own applications of research methods.

In the context of our modern interprofessional, multidisciplinary, collaborative health research world, especially within the qualitative research community, it becomes easy to forget that we represent different disciplines with highly distinctive origins and intellectual objectives. After all, we are all friends,

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working together on projects that are of common interest, and we are all trying to contribute to a better world. We all think of ourselves as enlightened individuals, freethinkers capable of drawing on the ideas and insights derived from a universe of disciplinary traditions. However, that early, rather extreme example contributed to what I believed to be a more fulsome understanding of the extent to which we are what we study, complete with a profound sense of the depth to which the disciplinary traditions into which we are educated, especially in the applied disciplines, shape the angle of vision we bring with us into all of our multidisciplinary activities.

Much of the fine tradition of qualitative health research methods available today derives from the historical context of what we collectively refer to as the “social” sciences. August Comte’s understanding in the early nineteenth century that authentic knowledge derives from personal experience and not simply from theological or metaphysical foundations led to a search for laws of social life that might mirror the physical science laws of the natural world (Pascale, 2011). However, strong critique of Comte’s brand of positivism led some scholars to reject hypothetico-deductive reasoning as the appropriate foundation of all social knowledge (Bohman, Hiley, & Shusterman, 1991). On this basis, a range of approaches to rigorously work with nonobjective data in order to study human behavior and try to understand the reasons that govern it started to emerge within the social sciences (Jovanović, 2011). It has been observed that, as a result of these historical tensions, the mainstream social sciences have a lingering skepticism for inquiry methods that seem bound to conventional scientific and evidentiary discourses (Alasuutari, 2010; Pascale, 2011).

Over the course of time, social sciences such as anthropology, sociology, and psychology generated a range of methods we now recognize as ethnography, grounded theory, and phenomenology to advance their disciplinary projects (Hamilton, 1994; Vidich & Lyman, 1994). Because these three methods dominated the field by the time the applied disciplines began to take serious interest in qualitative inquiry, it is important to remember that the intended trajectory of new knowledge these methodological originators had in mind was enacted primarily through careful theorizing (Berger & Luckman, 1966; Chenail, 1992; Durrenberger & Thu, 1999; Porter & Ryan, 1996). Simplistically stated (with apologies), anthropology’s mandate was to document and interpret human variations toward enhancing our grasp of that which is universal about being human. Sociology was concerned with working out the way human nature is manifest in social behavior. And psychology sought to understand the workings of the human mind, with the social psychology element particularly interested in ways in which that human mind shapes the ways we engage with one another. Although each of these disciplines has now branched into numerous subspecialties, including those working in applied “real-world” contexts such as health and social policy, their methodological origins within human philosophical curiosity

ensure that their preferred forms of scholarship remain quite solidly grounded in theoretical and empirical rather than practical problems (Leidner & Gregory, 2024; Reason, 1996; Reason & Torbert, 2001; Thorne, 2001). As such, the formal qualitative methodological traditions that derived from the intellectual projects of these disciplines continue to carry with them some of what we in the applied world may encounter as “theoretical baggage” (Thorne, 2020a).

Applied to the study of health issues, then, the fundamental point of social science research would not be to solve everyday problems of patients, but rather to capitalize on health phenomena to answer problems of a more elemental nature related to understanding how social groups behave and what constitutes the core nature of human experience (Alasuutari, 2010). To illustrate, there exists a strong sociological tradition of studying epilepsy as a prototypical lens through which to learn more about the workings of social stigma (Goffman, 1968; Mayor et al., 2022; Scambler & Hopkins, 1990; Schneider & Conrad, 1980). While such work may constitute fine social theorizing that informs us about the “non-clinical” world in which health and illness are played out, healthcare professionals and planners would clearly be remiss in assuming this constitutes evidence that epilepsy produces more problematic social disclosure issues than do other chronic diseases (Charmaz, 2020).

In direct contrast, applied science within the health disciplines draws its lifeblood directly from the world of practical realities (Chenail, 1992; Hall, 2013; Miller & Crabtree, 1994). Certainly, the applied health disciplines theorize, and often brilliantly so, but when they do, they tend to do so in the hopes that theorizing will facilitate better application. Essentially, it is in the nature of the clinically trained mind to “see” the prototypical human client at the end of the theorizing—to recognize a practically relevant knowledge gap out there in the world and to strive as purposefully as possible toward meeting it. In contrast, it is in the nature of the social scientist to see the theorizing as a legitimate and worthy goal in and of itself and sometimes to see the human being and his or her plight as an opportunity to advance that theorizing. In the interpretive (antifoundationalist, antinaturalist) world of nonapplied disciplines, the existence of some form of reality and its relationships to various truth claims is contested ground. As Shusterman puts it: “Having abandoned the ideal of reaching a naked, rock-bottom, unmediated God’s-eye-view of reality, we seem impelled to embrace the opposite position—that we see everything through an interpretive veil or from an interpretive angle” (1991, p. 103). Taking this perspective, what social scientists know about a phenomenon depends more upon the theoretical lens they bring to understanding it than on any immutable properties it may possess. By extension then, the competing theoretical positionings social science brings to the study of a thing become the intellectual standpoints from which to debate it, with no pretense that one will have better truth value than another because the real world upon which a truth claim must be grounded is itself simply an idea.

I unabashedly admit that, in saying this, I am expressing this distinction as an extreme polarity that undoubtedly overlooks a multitude of exceptions. (As Mark Twain's oft-cited adage reminds us, *All generalizations are false, including this one.*) However, I do this intentionally because I believe that the difference is vitally important when it comes to grasping why it is that conventional social science methods cannot advance practice knowledge in quite the manner that the applied health disciplines require, and therefore why variant approaches to discovery are sometimes needed.

### ***The Nursing Example***

Nursing is a somewhat complex and “messy” discipline, having been born of the universal practical requirement to care for the sick within society and growing to maturity in close partnership with its more science-minded cousins in clinical medicine. It has weathered the storms of gender bias and economic disadvantage and emerged from a period of political awakening in which it has matured beyond a sense of being an oppressed group within the society of professionals and into an awareness of the power that comes from public trust. It has grappled with identity politics (is it a quasi-religious “calling,” an occupational entity, or a full profession?) and whether it does or does not possess a distinctive scientific basis apart from that of medicine and other health sciences. Further, for much of its modern history, it has attempted to resolve these matters through theorizing, an activity that has often seemed an uncomfortable bedfellow with its practice aims.

However frustratingly problematic the nursing discipline may be, it is also exquisite in its complexity and its purity of purpose (Sellman, 2011). And it is these properties that are important in understanding why nursing's need for knowledge would drive a quest for new methodological options (Dzurek, 1989; Morse, 2012; Reed, 1995; Sidani, Epstein, & Moritz, 2003; Thompson, 1985; Watson, 1995). Nursing always and inherently requires knowledge about recurring patterns across people and cases in general so that it can better inform the care of the unique and distinct individual. The application of nursing knowledge occurs through dialectic processes (Risjord, 2010). The care of any individual patient inherently involves an examination of the interplay between objective and subjective information, such that technical detail about the hip replacement procedure that is about to take place is carefully tempered by the distinctive humanity of the person who is entering that surgical experience. As you discover things about an individual patient, these inform your interpretation and uptake of the available knowledge, which includes not only formal evidence but also shared clinical wisdom, pattern recognition, established practice, ethical knowledge, and the “how to” craft of artfully aligning all of those together into competent and compassionate practical application (Johnson & Ratner, 1997;

Liaschenko, 1997). Nurses draw upon an amazing array of diverse knowledge sources, sorting and organizing available knowledge options according to an internalized conceptual framework that derives from the philosophical understanding of why we nurse; on the basis of that organized knowledge nurses create applications tailored to the specific patient we find before us today. Even if we are applying a standardized intervention for a health problem we have encountered hundreds or thousands of times before, nursing holds dear the conviction that this particular individual may be the one who requires a new twist in the standard scheme, a new adaptation to the typical approach, in order to achieve his or her optimal level of health at this time and in these circumstances. And this marvelous tension between the general and the particular characterizes the inherent complexity of nursing's intimate relationship with knowledge development (Thorne & Sawatzky, 2014).

Of course, nursing's praxis orientation—that dialectic between practice and knowledge—is not unique, and other applied disciplines certainly share many of the same qualities and draw upon many of the same historical thought traditions (Maxwell, 1997). However, nursing is so utterly steeped in them, and they are so central to the core business of the discipline, that knowledge forms capable of shedding light on that dialectic between conceptualization and action have tremendous value within the everyday practice world (Hall, 2013). Thus, nursing's comfort within the world of complexity and contradiction, its enthusiasm for ways of thinking that acknowledge the messiness of the everyday practice world, and its fascination for both pattern and diversity help explain why it would have taken a leading role in what has become a generation of methodological development within the applied qualitative health research field.

### ***Methodological Ancestry***

Interpretive description is an approach to knowledge generation that straddles the chasm between objective neutrality and abject theorizing, extending a form of understanding that is of practical importance to the applied disciplines within the context of their distinctive social mandates. It responds to the imperative for informed action within the admittedly imperfect scientific foundation that is the lot of the human sciences.

The methodological approach that grew into what is now called interpretive description arose from the necessity to find a way to do the kind of applied qualitative research that could generate the kinds of understanding of complex experiential clinical phenomena that would be optimally relevant and useful to the practice of nursing and other professional disciplines. concerned with questions “from the field.” Disentangling methodological strategies and techniques from the theoretical assumptions inherent in the original social science disciplinary projects for which the conventional qualitative research approaches

were originally intended, the idea of interpretive description was to retain the coherence and integrity of a theoretically driven approach to knowledge development while supporting defensible design variations according to the specific features of context, situation, and intent. In so doing, it emphasized a design logic and organizing framework consistent with the epistemological integrity of the discipline as a hallmark of excellent qualitative accounts of the phenomena of concern to the health and applied professions.

My first attempt to write about the possibility of an alternative to the conventional qualitative approaches for applied health research was published in 1991. At that time, qualitative researchers in the health field were still quite defensive about the quality of their contributions and tended to rely quite heavily on “established methods” from the social sciences in order to lend credibility to their empirical contributions. Not only did it seem requisite to “locate” oneself within a particular methodological tradition, naming the particular theorists upon whose work one was building, but one was also expected to follow the associated rule structure meticulously (Bartolomé, 1994; Janesick, 1994). However, consideration of the disciplinary projects from which the available methodological traditions derived makes it evident that those rule structures had clear and explicit origins within certain assumptions about knowledge and its creation that were not necessarily applicable (and, at times, stood in direct contradistinction) to scholarship in the applied context.

As the informed reader will immediately recognize, the disciplines to which I refer and the methodological traditions that have evolved from them over many generations are extensive, complex, and multifaceted. They have taken up the working lives of armies of scholars and warranted millions of pages of thoughtful text. In providing a very brief synopsis of each of these fields, I invariably do a great injustice to the integrity of these fine traditions within their intended context. However, in order to establish the argument I am making here for why they can’t and don’t work well if taken up as uncritically held rule conventions guiding primary research in the applied fields, including research to advance knowledge needed by the health professions, it seems fair to provide a short explanation of what I understand the historic roots of these methodological traditions to entail.

### *Ethnography*

Ethnographic methods as we know them today have evolved over the past century or so as anthropology has attempted to unravel the mysteries of the nature of human existence through careful study of its diverse expressions. Emerging out of the dominant perspective that “primitive” cultures revealed something of the evolutionary heritage of modern humankind, the ethnographic tradition celebrates human cultural variation as a window into understanding the logic

of social organization, cognitive function, and human complexity (Howard & McKim, 1983). It does this through decoding the specific elements of human experience that emerge within the contextual whole of a culture (Sanday, 1983).

In ethnography, direct observation of human behavior and interviewing members of the culture about the meaning of that observed behavior are central mechanisms for ensuring that the cultural actor's perspective will inform the researcher's analysis. Although scholars have differed with respect to the extent to which the cultural actor's *emic* view illuminates or blinds us to the more complete *etic* view of a culture (Hammersley & Atkinson, 1983; Kaplan & Manners, 1972; Pelto, 1970; Van Maanen, 1988), with the majority of anthropologists themselves the product of a dominant western perspective, the ethnographic tradition has been characterized by a significant degree of relativism (Hammersley, 2018; Hammersley & Atkinson, 1983).

### *Grounded Theory*

Grounded theory is an approach whose origins are attributed to the early collaboration between Barney Glaser and Anselm Strauss (Glaser & Strauss, 1967). Reflecting solid sociological origins, its intricate methodological direction is derived from the fundamental assumption that human behavior can only be understood within a "collective consciousness" to which the members of the group have no conscious interpretive access (Bowers, 1988; Heller, 1986). Sociology itself arose out of the project of anthropology, with which it was originally closely allied (Strauss, 1987). It departed from the ethnographic enterprise in the extent to which it assumed knowledge about the meaning of social behavior is accessible through direct inquiry methods at the local level. Where key informants might provide the anthropologist with the basis upon which to interpret the meaning of certain characteristic behavioral patterns within a society, sociologists felt that the naturalistic and relativistic bias of consciously accessible information was more likely to distract scholars from grasping the underlying network of social structures within which the observable patterns begin to make larger sense. This distinction between perspectives on whether people's own subjective interpretations of their actions are or are not likely to be accurate in the wider scheme of things becomes a fundamental feature of the distinctions between sociology's grounded theory tradition and its methodological predecessors.

Since the vast majority of sociological activity occurs at the level of understanding the interaction between societies and the individuals who compose them (Outhwaite, 1975; Schwartz & Jacobs, 1979), the objective of sociological research was to understand those social forces that shape human activity (Schatzman & Strauss, 1973). While sociologists might participate in field research in a manner that resembled that of ethnographic study, their constant comparative analysis was firmly located at the dialectic between micro- and macrolevels

(Cicourel, 1981; Fielding & Fielding, 1986). Thus, the products of sociological inquiry using grounded theory methods are explicitly aimed at theory building, in contrast to the ethnographer's pursuit of documenting what sense people make of how they are structuring their world or the phenomenologist's efforts to render articulable those essential elements of subjective human experience that are beyond the reach of normal consciousness or discourse.

### *Phenomenology*

As a methodological derivation of a philosophical stance on fundamental questions of ontology (the nature of being) and epistemology (the nature of knowledge), phenomenology seeks to understand the essential nature of a thing, or those dimensions “without which it would not be what it is” (van Manen, 1990, p. 10). Phenomenology holds as a central value the premise that the most basic human truths are accessible through deep understanding of human subjective experience (Burch, 1989; Cohen, 1987; Giorgi, 1970; van Manen & van Manen, 2021). Phenomenologists strive to work through and around the filter of human thinking in order to obtain knowledge of the deeper essential structure of what it means to be human. “It is the methodology through which I come to understand myself as that ego and life of consciousness in which and through which the entire objective world exists for me, and is precisely as it is” (Husserl, 1929/1975, p. 8). As such, within the phenomenological tradition, all knowledge is an interpretation, inevitably made through the “exteriorization” of life and reflection upon the effects it produces on others (Ricoeur, 1981b). Phenomenological approaches to research draw on an empathic understanding through sympathetic introspection and reflection—a tradition known as *verstehen* (Patton, 1980). As such, phenomenology promotes a fascination for the places of contact between the person and their reality (Van Kaam, 1966), especially as brought to expression through linguistic form (Gadamer, 1975/1985; Schutz, 1932/1967). An inherent paradox within phenomenology is that, by generating human consciousness of a truth that is already manifest within the intelligibility of human experience, that truth inevitably changes (Burch, 1989).

### *Departure and Diversification*

In keeping with the needs of the disciplinary projects for which they were invented, ethnography, grounded theory, and phenomenology spawned complex procedural rules regarding the use and application of their various approaches to inquiry. So, for example, ethnographers developed a set of traditions as to what constitutes fieldwork and the extent of immersion required in order to justify credible claims about a culture. Grounded theory scholars developed rule structures relating to maximal variation of sample, theoretical saturation, and

various layers of essential data coding. Similarly, phenomenologists developed techniques for bracketing prior knowledge and meticulously distinguishing interpretation from explanation. Because the conclusions scholars within these disciplines might reach were entirely dependent upon the integrity of the methods by which they arrived at them, rigid attention to methodological rule traditions became a primary hallmark of credible qualitative social science. While numerous methodological derivations and refinements have emerged over the years, this adherence to recognizable tradition has remained an important dimension of how scholars continue to evaluate quality (Harley & Cornelissen, 2020; Sandelowski, 2014).

When nursing and other health sciences began to take up qualitative methods, this methodological “purity” was generally regarded as essential for rendering qualitative work meaningful within the larger academic health research context. Many of the well-known pioneers in qualitative health research had solid academic grounding within one or another of the social science traditions, commonly through the socialization of doctoral training. The methodological detail within their written reports made explicit the genealogical heritage they were building upon, and many of them became fluent and effective within the theoretical idiom of those disciplines.

However, as an increasing number of health researchers began to take up qualitative approaches in an attempt to answer some of the puzzling practice questions that had not proven amenable to meaningful study using conventional quantitative methods, the limits of the social science approaches when applied to the clinical health context began to surface (Johnson, Long, & White, 2001). While nursing and health researchers had found participant observation and interviewing, the major field methods of ethnography, easily adaptable to the new health-related questions they were posing, they were rarely prepared to examine these applied and practice phenomena within the larger context of whole cultures (Aamodt, 1991). Instead, they relied heavily upon the formal ethnographies of anthropologists to contextualize their specific findings within a larger understanding of the whole, recognizing that descriptions of specific behaviors, rituals, or beliefs outside of an appreciation for the kinship rules, linguistic patterns, or worldviews of the culture would be dangerously narrow and potentially quite unethical (Germain, 1986; Omery, 1988).

Similarly, although the constant comparative analytic approach derived from grounded theory methodology seemed comfortably similar to the clinical reasoning process with which nurses and other health professionals examine the conditions inherent in each new clinical case against features of all others they have encountered (Chenitz & Swanson, 1986b), rarely were health professional researchers overly concerned with theorizing the dialectic between social forces and individual interpretation *per se*. Rather, their analyses tended to acknowledge that social behavior may or may not be at play in any given instance and

apply that theoretical insight to the practice problem only when it seemed to serve some practical purpose (Hutchinson, 1986; Stern, 1985).

Just as grounded theory and phenomenology differed quite markedly in their positions regarding the use and meaning of subjective knowledge, a similar distinction between the ultimate purpose of phenomenology and the intellectual project of the health disciplines arose in the literature. Because of nursing's historic affinity for application at the level of intimate individual experience, phenomenological methods involving intensive engagement between the knower and the known seemed at face value particularly consistent with the discipline's deeply held moral conviction that each patient represents a unique and deserving individual. Consequently, phenomenology's confirmation of the importance of subjective reality attracted many nursing and health researchers to experiment with its potential for uncovering experiential clinical knowledge (Artinian, 1988; Oiler, 1986). However, in contrast to a more purist phenomenological orientation that sought to uncover the deeper essential structures of "being," and was deeply concerned about assumptions of the extent to which these are or are not shared, the applied health researchers tended to use the method to justify inquiries into those aspects of human health and illness experience that were understood to be sufficiently common as to warrant generalization for the purposes of applying insights to improve sensitive practice (Anderson, 1989). Rather than bracketing the context, they employed it in the selection of topics and emphases, recognizing its dynamic nature in the practice setting, thereby conflating concern with subjective experience with an analysis of the essential structures underlying it (Norlyk & Harder, 2010). Thus, in ignoring phenomenology's commitment to the inherent separation of the person from their world, applied health researchers attempted to sidestep what has been described as the "incommensurable views on the nature of subjectivity" between the two perspectives (Yegdich, 2000).

While many health scholars unselfconsciously (or perhaps unconsciously) molded and adapted the social science approaches to meet the needs of their qualitative inquiries, others came to recognize that there was an inherent and irreconcilable mismatch (Thorne, 1997a). Ethnographers in the anthropological tradition understand human nature as the object of studying variation. Grounded theorists within sociology assume that the value of research is to uncover the tacit basic social processes that drive human action. And phenomenologists within psychology and related fields perceive reality as that which exists because it is experienced through the essential structure of human subjectivity. While each of these disciplinary traditions has a role to play within the larger world of ideas, none of these approaches is particularly compatible with the pragmatic demands of the applied disciplines, whose members find themselves incapable of suspending action until they fully understand a problem (even if they could agree on the nature of that understanding). While they can appreciate the intellectual standpoint that objective and subjective realities may be mutually exclusive,

the messiness of everyday practice requires that those within the applied health fields inevitably straddle both (Stajduhar, Balneaves, & Thorne, 2001). And, therefore, many health researchers found that they had to reject social science methods as the best way to answer qualitatively derived health questions.

With conventional qualitative methodological traditions falling short of the needs of the health research community, a range of explicit and implicit adaptations were beginning to creep into the disciplinary literature. Various researchers blended and borrowed among the available traditions, sometimes making that explicit in their design discussions, but more often it was more implicitly evident in their design descriptions, their language choices, and the specific sources from which they acknowledged guidance. Within this context, expressions of concern began to appear in the literature that qualitative studies ought to be held to a strict set of standards to avoid sloppiness and “methodological slurring” (Baker, Wuest, & Stern, 1992; Cutcliffe & Harder, 2012; Johnson, Long, & White, 2001; Morse, 1989a; Stern, 1994). In contrast, some applied health researchers sought methodological variants from the conventional options, some of which derived from disciplines even further afield from the health project, but perhaps with fewer rules governing their canon. In this context, such alternative approaches as narrative inquiry, autoethnography, ethology, and case analysis started to emerge as descriptors for qualitative health inquiries. This proliferation of claims about research design and method reflected a widespread experimentation toward better ways to legitimize research approaches that would serve the knowledge needs of the disciplines without running afoul of the “methodological police” or detracting from the tenuous credibility of the qualitative research movement within the health science community (Maxwell, 2013). However, when applied to answering health field questions, many of the products deriving from these diverse approaches still had a similar “look and feel.” As Morse observed, there seemed to be a considerable amount of legitimate qualitative research being conducted to address the disciplinary knowledge requirements within the health field for which, to that point, there was “no name” (1989a, p. 6).

### **The Genesis of Interpretive Description**

In keeping with these evolving tensions apparent in the qualitative health research literature, and spurred on by observations that nursing’s pragmatic aims might be best served by research approaches of a different order than those developed for the more theoretically inclined disciplines (Carter, 1985; Meleis, 1987; Schultz & Meleis, 1988; Woods & Catanzaro, 1988), I began to wonder if it might be possible to work out a design logic in alignment with the specific requirements for knowledge within nursing and the health professions (Thorne, 1991). I was encouraged in this enterprise by the methodological developments arising from the field of educational studies, in which the particularities

of formal methodological adherence had never become such an obsession and whose proponents more easily justified their adaptations by virtue of the decidedly distinct nature of their disciplinary enterprise—having to do primarily with learning rather than being, and with systems rather than individual experiences. In particular, Michael Quinn Patton's contributions to qualitative evaluation research (1987) and the naturalistic inquiry approach advanced by Yvonna Lincoln and Egon Guba (1985) were examples of attempts to articulate rigorous and thoughtful disciplinary methodology explicitly drawing upon particular elements borrowed from the conventional approaches but reconfiguring them according to the distinctive logic inherent in their new purpose.

Recognizing that methodological eclecticism was strategically unwise in the health science context of the day, I became intrigued with the challenge of working out guidelines for qualitative approaches that would extend beyond mere description and into the domain of the “so what” that drives all applied disciplines. It was evident that locating my clinical research entirely within the theoretical traditions of the social sciences might contribute to social theorizing without necessarily producing knowledge of a form that could be of any direct or applied use. In so many aspects of the practice disciplines, there are observable patterns of human subjective experience and behavior that cry out for better and more comprehensive understandings. To work out how we might obtain such understandings, apply them to the betterment of lives or services in our everyday world of practice, and know what aspects of them deserve further study, some form of “explanatory” interpretive analysis seemed fundamental. This tension between theoretical integrity and real-world utility has come to be quite central to my own thinking and is the element that drives the overall logic of this methodological entity we are now invoking when we use the language of “interpretive description.”

In the mid-1990s, I had the privilege of working closely with two nursing graduate students who had shown a particular aptitude for wrestling with the integrity of the design logic for their own research projects, and together we wrote a manuscript designed for a nursing audience about what a qualitative method could look like distinct from the confines of what we referred to as the available “categorical” options. That manuscript was eventually published in *Research in Nursing & Health*, which was at that time the most credible among the nursing journals that would entertain a qualitative methodological piece (Thorne, Reimer Kirkham, & MacDonald-Emes, 1997). It became the original “Interpretive Description” methodological reference point.

In response to subsequent requests from graduate students and others from diverse applied disciplinary traditions who corresponded with me following the publication of that first paper, we eventually wrote (co-authored with one of the former co-authors and an additional graduate student) a second paper delving further into the analytic process inherent in the method (Thorne, Reimer

Kirkham, & O’Flynn-Magee, 2004). These two papers set out the core of what interpretive description represents conceptually, philosophically, and methodologically, and were the foundation upon which subsequent work, including this book in all of its editions, has been constructed. It is a “method” I have worked with for many years now. From my experience, and the insights of many others who are similarly intrigued by the project, I have developed a solid confidence that it serves a purpose, providing an organizing logic with which to generate meaningful scholarly products that have application and knowledge translation built into them from the outset to meet the specific kinds of knowledge needs that characterize the applied fields. It has been taken up quite widely within the health field, and others, beginning with Buissink-Smith and McIntosh in the discipline of tourism and leisure studies (1999), began to articulate its utility for the development of knowledge within applied disciplines beyond the health domain. In writing the first edition of this book in 2008, I “fleshed out” the conversation to make more explicit a way of thinking through the unique and particular design challenges that occur in the context of any applied or health study when one tries to blend methodological integrity with a deep understanding of the nature of knowledge within the application context.

Since the first edition of that text was first published, enthusiasm for exploring the potentialities inherent in a method that invites applied scholars into “ownership” of the epistemological direction of their qualitative studies has continued to attract interest. The field of “applied” qualitative methods has marched forward, with a proliferation of new and different methodological options now on offer (see, for example, the work of Jonathan Smith and colleagues (Smith, Flowers, & Larkin, 2009) in methods tailored for cognitive psychology). And quite naturally, in the lively environment of the questions raised and challenges posed by graduate students, collaborators, and colleagues (including Burdine, Thorne, & Sandhu, 2021; Chiu et al., 2022; Jensen et al., 2018; Lee & Thorne, 2022; Ocean et al., 2022) across disciplines and contexts, my thinking about the nature and impact of this methodological direction continues to evolve (Thorne, 2013a, 2016, 2019a, 2020a, 2022b, 2022c; Thorne, Stephens, & Truant, 2016). The second edition in 2016 expanded the guidance on data analysis and knowledge translation in particular, and this third edition represents the integration of evolving insights from developments across the applied qualitative research world as scholars in an expanding diversity of disciplines explore the possibilities and potentials inherent in this approach.

In reflecting on how best to approach this third edition, I sought wide input from colleagues and trainees, including new scholars and seasoned users who had used the method in its prior edition in their own training. Like all good qualitative researchers, I looked for patterns within their comments and also outliers that might point me toward new angles of thinking. Much of the core of this edition retains the same structure, updated and revised for clarity in the

places where the earlier versions may have left questions unanswered and the language sensibilities that continue to evolve in the scholarly world. And in considering what to reference, I have updated a number of sources, retained many of the original (now historic) “classics” that have been so important to me in my own evolving thinking, and integrated many of the newer methodological angles and arguments that have surfaced in the literature in the ensuing years. Qualitative methodological thinking continues to attract fine minds across the world and across disciplinary communities, and I remain inspired by that vision, intelligence, and commitment to integrity of purpose. And in the limits of what a revised edition can aspire to, I am aware that so much of importance has yet to be brought into this conversation and will need to await the next generation of scholars.

### **What Interpretive Description Is and What It Is Not**

Armed with an understanding of the specific disciplinary origins from which it came and the theoretical, technical, and terminological problems it was designed to solve, I hope that readers will be able to effectively locate interpretive description within the larger lexicon of qualitative methodological choices so as to determine whether it has relevance for their own research undertakings. Toward this end, it seems important to try to clarify some of the more obvious misunderstandings I have encountered about its aims and scope.

As I will further elaborate throughout the chapters of this text, interpretive description does not pretend to be a prescriptive, circumscribed sequence of steps that will reliably lead to new discoveries. It is not, therefore, in any usual sense of the term, a formal “method.” However, when researchers reference interpretive description as the methodological approach they are using to guide their research, they are informing their reader about where they stand theoretically and epistemologically in entering into the study, they are highlighting the applied nature of the knowledge they are seeking to generate, and they are committing to an auditable design logic throughout their study in alignment with that positioning. In other cases, when researchers invoke the term in relation to a study that takes primary direction from another methodological tradition, they are telling us that they intend to depart in some strategic manner from adherence to usual rule structures or expectations within that tradition and are drawing on interpretive description logic to justify those methodological modifications.

Interpretive description does not pretend to represent a radically new or distinctive approach to inquiry or a methodological direction that is trying to set itself up to compete against work being done by applied researchers who may have found a comfortable way to work within those more established qualitative methods. Rather, as its origins reveal, it was born out of studying the attributes and qualities that distinguish useful and relevant qualitative studies for

the applied and practice world, regardless of the tradition through which they claimed to have been conducted, and recognizing that many thoughtful scholars across the applied disciplinary communities found it difficult to get there by manipulating their way through conventional methodological rule structures (Hunt, 2009; Oliver, 2012). In an era in which numerous variants of all of the conventional social science methodologies have become popularized, trying to argue a direct comparison with interpretive description would seem to miss the point (Berterö, 2015). Some applied disciplinary scholars will bend and modify methods originally derived from social science traditions to conduct perfectly fine qualitative studies; others who find that the mental gymnastics of trying to negotiate and justify their approach within the framework of a tradition that was never designed to fit their intentions will decide that interpretive description offers them that freedom of movement. And since researchers using any method can theoretically produce intellectually weak or strong research products, there is no practical benefit in trying to argue which is inherently preferable. Indeed, there is room for all of us to make important contributions to knowledge in our fields.

Thus, interpretive description shamelessly encourages borrowing from the full universe of available design techniques if that technique seems most appropriate to the nature of the research question at hand. But instead of forcing an overall design logic that had historically proved to be an awkward fit with the types of questions that applied researchers wanted to ask, it invites researchers to move beyond rule structures imposed by disciplinary standpoints that need not apply and replace them instead with more relevant and meaningful disciplinary logic. Similar arguments for methodological modification are emerging across many applied disciplines using different nomenclature and reasoning, and the available options for what one calls one's research method are in constant evolution.

Finally, interpretive description does not represent an excuse to strip away all theoretical or disciplinary underpinnings in order to dive into a simplistic study of a thing (Kahlke, 2014). Although such an approach may play a useful role in the development of new fields of inquiry (Sandelowski, 2000), and with the advent of the more generic "health science researcher" absent a professional discipline we may see more of this in the future, my discipline has relatively little use for mere description without purposeful direction. Instead, the motivation behind interpretive description is explicitly to strengthen qualitative research by realigning it with the epistemological underpinnings of the applied disciplinary project for which it is being used. The point is not to "sell" the method; it is all about supporting the highest quality and most relevant qualitative studies possible in our applied fields so that we can all fully benefit from the unique and particular kinds of insights that the qualitative enterprise makes possible.

Thus, I see interpretive description less as a discrete method per se and more as a means by which to name and clearly reference the kind of well-founded

organizing logic that applied researchers have always been striving toward in their various applications of qualitative research within the health domain. Interpretive description articulates a *raison d'être* for this kind of work and offers a nomenclature by which scholars working in this space might choose to distinguish their intentions from those of their methodological ancestors. It offers a viable alternative to what we sometimes observe as modifying or “watering down” conventional phenomenology, ethnography, or grounded theory, and hoping no one notices or challenges our methodological rules violations (Johnson, Long, & White, 2001). In contrast to simply referencing our applied qualitative disciplinary research products as “qualitative description” (Neergard et al., 2009; Sandelowski, 2000) or “generic qualitative research” (Caelli, Ray, & Mill, 2003), it tells us something fundamentally important about the disciplinary motivation from which our research question has arisen, about the audience toward which it is directed, and therefore about the quality criteria to which it ought to be held. And throughout a study, it encourages integrity and authenticity with respect to what we say we have done to achieve our findings and how we demonstrate that.

In this way, interpretive description becomes a conceptual maneuver whereby a solid and substantive logic derived from a disciplinary orientation justifies the application of a universe of available techniques and procedures beyond their conventional contexts and rule structures. By allowing us to organize study design around our disciplinary conceptual and epistemological frame, it also permits us to build up a body of knowledge about the implications of design technique in relation to the infinite universe of applied phenomena about which our disciplinary communities might have an intellectual curiosity. And, as such, it provides us with a solid and defensible basis upon which to judge whether a particular piece of qualitative research output is worthy of our serious attention as credible knowledge.

Interpretive description is therefore best understood as a conceptual label through which to signify attributes of the kind of qualitative research approach one intends to embark upon. It is an approach that requires an integrity of purpose deriving from three sources: (1) an actual real-world question, (2) an understanding of what we do and don't know on the basis of all available empirical evidence, and (3) an appreciation for the conceptual and contextual realm within which a target audience is positioned to receive the answer we generate. It constitutes a methodological direction that generates questions from applied disciplinary grounding, pushes one into the “field” in a logical, systematic, and defensible manner, and creates the context in which engagement with the data extends the interpretive mind beyond the self-evident—including both accumulated knowledge (such as clinical wisdom) and what has already been established (such as through empirical means)—to see what else might be there. As such, it offers the potential to deconstruct the angle of vision upon which prior

understandings have been erected and to generate new insights that not only shape ongoing inquiries but also translate them into practice.

As with all qualitative research, interpretive description's claims to generalization must be understood as tenuous. However, the evidence-based practice context in which decisions are being made on a daily basis in the health field makes it increasingly imperative that we have access to research methods that allow us to critically interpret why the current state of empirical science is the way that it is and what that means for the ways we "do business." As Morse expresses it, this kind of knowledge:

provides a moral dimension, sensitizing us to significant issues; it serves as an advocate for the vulnerable, communicating their concerns; it critiques health science; it identifies and documents critical lifesaving actions of care; and it provides a moral commentary on removing inhumane practices and creating humanizing change.

*(2012, p. 68)*

Thus, we desperately need new knowledge pertaining to the subjective, experiential, tacit, and patterned aspects of human health experience—not so that we can advance theorizing, but so that we have sufficient contextual understanding to guide future decisions through which the available evidence will be applied to the lives of real people (Morse, 2007).

As the reader will discover, the treatise on interpretive description that this book represents will fail as a "cookbook" in that there are very few explicitly prescriptive guidelines. Because various design elements become either brilliant or ludicrous depending on the research context within which they are being applied, it will offer more substantive guidance on what to avoid than it will elucidate exactly what one must do to ensure the integrity of an applied qualitative project. Rather, it will invite readers into a conversation about the meaning and nature of the disciplinary projects within which they seek to pose their research questions, inspiring thoughtful and credible qualitative design choices in alignment with that discipline's ultimate mission and mandate. In describing the reasoning processes through which good scholars work out a design logic that reflects integrity both for acceptable science and for the philosophical underpinnings of the applied disciplinary world, the ideal to which it strives is to support the reader in grappling intelligently with the "how to" that best exemplifies the "why."

# 2

## CULTIVATING QUESTIONS IN THE APPLIED PRACTICE FIELD

### **What's the Question?**

Research questions don't simply materialize out of thin air. In the context of disciplines such as the applied health fields, they clearly derive from the universe of clinical and practical problems for which the knowledge that is available is insufficient. Beyond their contextual origins in the practice setting, research questions also have explicit derivation within the academic "project" of various disciplines—in other words, they must be grounded within a reason for inquiry before the specific new question makes any sense. This disciplinary orientation is what distinguishes a research question from one that is merely journalistic or curiosity-driven. Indeed, anyone can gather data and make claims (as the internet information explosion so powerfully illustrates), but only those who have credibly located themselves within the scholarship of a discipline and/or the mandate of a profession associated with that discipline can legitimately generate qualitative findings that will have meaning as a form of empirical disciplinary knowledge.

Although it may seem self-evident that research quality depends upon the match between the question and the method, the act of generating questions is itself a complex mental operation. Here we examine some of the inherent challenges in the process and invite reflection on the nature of questions in general before entering into a discussion on how one might frame questions within the interpretive description context.

### ***Where Have We Come From?***

In conventional quantitative health science, the grounding of new inquiry upon existing knowledge is well understood; it becomes a significant component

of what distinguishes a worthy scientific claim from a data-referenced “spin.” But qualitative research within the health fields has at times followed a different path, perhaps because of its distinct history and tradition within the larger context of social science research. I trace the enthusiasm for qualitative health research to the seminal contributions of social science giants such as Goffman (1961), Sudnow (1967), Strauss (1975), and Kleinman (1980). Inspired by such work, by the middle of the 1980s, a cadre of pioneering nurse researchers, such as Anderson (1981), Field and Morse (1985), Leininger (1985), Parse and colleagues (1985), Chenitz and Swanson (1986a), and Munhall and Oiler (1986), had begun to advocate for the adoption of this new “paradigm” of scientific progress in which the inherent complexities of human subjectivity and social behavior could become a central focus of inquiry instead of simply a contaminant within the research process.

These early qualitative health research proponents typically adopted a *Kuhnian* paradigmatic stance (Kuhn, 1962) in their understanding of “scientific revolutions,” and for at least a decade located qualitative efforts as explicitly contrary to the logical positivism from which quantitative approaches were presumed to derive. Thankfully, our community of scholarship has evolved on the basis of a deeper understanding of the philosophical perspectives shaping our epistemological and ontological disciplinary positions. However, for a time, the world of health research seemed quite polarized into the two kinds of research, as if they were inherently mutually incompatible and their adherents were incapable of reading one another’s work or understanding shared research problems, let alone working together to resolve them. This history may help explain some of the defensiveness that can be detected in earlier qualitative work (and that still creeps into some contemporary reports) and some of the choices that were made by various scholars in how they framed and presented their studies.

### ***What Constitutes a Qualitative Question?***

Qualitative research typically seeks to generate empirical knowledge about human phenomena for which depth and contextual understanding would be useful and for which measurement is inappropriate, premature, or potentially misleading. While quantitative science has generated marvelous traditions within which information about groups and populations can be distilled, qualitative scholars tend to focus upon patterns and themes representative of individual human experience. To some extent, they reflect distinctions between objective and subjective knowledge, between confirming value-neutral truths and depicting experiential realities.

Understanding the difference between the general epistemological stances from within which the methodological traditions derive is important because it ensures that you align the methods by which you seek answers with the nature

of the questions you are asking in the first place. You can't draw conclusions about how people "feel" from documenting how they "behave," nor can you sum up people's perceptions of a situation and conclude that unanimity confirms that you have a generalizable "truth." Sometimes it is difficult distilling the specific question that might be amenable to research out of a complex set of practice issues or problems that intrigue you. Rather than simply being satisfied with having named or alluded to a problem, the act of turning it into a question focuses the mind and forces a kind of precision of thought that will serve to guide your process from beginning to end. And in that context, an important step of the research process involves clarifying the various options you have for isolating a researchable problem and articulating it in such a manner that it can draw upon formal research methods toward finding an answer.

For example, if you were interested in providing better care for patients in chronic pain, you might consider evaluating the equivalence of various pain measures, experimenting with different protocols for enhancing intervention, or exploring the worldview of those who had lived long enough with the phenomenon to form opinions about how various care options were subjectively received. Each is a worthy objective, and each requires an entirely different research approach. On the basis of each of these, you might be able to generate a study that yielded some answers, but only about the question you had posed. So, for example, by comparing pain measures, you might indirectly help enhance the work of those who intervene or give care, but you could not claim conclusions about those elements directly.

When we understand the nature of a qualitative question, we can think through what it is and what it is not and, using our logic, predetermine appropriate methods by which it might be tackled and the scope and limits of what we might be fortunate enough to find. Being able to think through the relationship between a problem, a question, a method, and the eventual research product is an essential skill in becoming proficient in research. If this is your first attempt, you may find it very challenging to think more than one or two steps ahead of yourself, and for this reason, most of us require experienced guides to take us on our first such journey. In the absence of such guidance, you might consider creating a research "support team" (often other neophyte researchers are equally eager to connect and share ideas) or generating a virtual dialogue. While seasoned scholars often become quite comfortable in solo qualitative research, the majority of us learn the tradition best with a combination of intensive reading, reflecting, conversing, and wrestling with ideas. Because, despite great advances in software and technological supports, qualitative research relies entirely on the mental agility of the researcher, and drawing upon a variety of strategies to get your mind in shape for the challenge is strongly recommended.

### ***What Constitutes a Disciplinary Question?***

Beyond serving as a convenient mechanism for organizing universities, academic disciplines play an important role in creating communities of scholars

who can work from a common set of foundational intellectual building blocks to drive knowledge development in particular and identifiable directions. While an academic department will typically house a wide range of scholars working on quite different elements of disciplinary knowledge, the underlying structure, assumptive set, and intentionality of their academic discipline will create a coherence that allows them to, for example, build curriculum, decide whether a thesis is or is not acceptable, and bring their various scholarly projects into an understanding of a coherent whole. That may seem to oversimplify the current status of academic disciplines that have become marvelously diverse and complex, but I think it remains an important piece of the puzzle in understanding why, in our interdisciplinary world, disciplines continue to play a vital role.

In the medical science context, we are comfortably familiar with the value of explicitly capitalizing upon different orientations toward a problem. Where a medical emergency involves multiple organ systems, the competing perspectives of relevant medical subspecialists will ensure that the rights of each organ are considered in the development of safe and effective solutions. In this context, we appreciate that each angle of vision “advocates” for a particular perspective, and we generate dialogue among those perspectives to create what are understood to be the best therapeutic options. At the same time, we fully appreciate that it is the “whole person” who stands to lose if the decision is wrong, and we trust each of those subspecialists to critically weigh the conclusions derived from their specialty perspective against the whole situation. Thus, we appreciate the value that diversified interests and perspectives bring to a problem, and we would recognize that much could be lost if we attempted to homogenize them into a lesser degree of knowledge about many specialties held by a single practitioner.

In the interdisciplinary academic context, the same principle applies, although many scholars seem to have forgotten this in their enthusiasm to embrace a spirit of cooperation and collaboration. In an earlier era in which interdisciplinary study was often considered inherently weak and unprincipled, most of the problems arose from the inability to collaborate and share (much like what would occur in the fragmented context of medical decision-making if the subspecialists refused to engage in respectful dialogue). Much of the current interdisciplinary fervor seems a reaction to that earlier divisiveness. We comfortably study together, borrow knowledge, share methods, and (at times) seem to be speaking the same language. However, while that new spirit of cooperation fosters some excellent new partnerships, it can also create a climate within which people pick and choose ideas without understanding their heritage and context and unwittingly generate intellectual claims that are impossible to evaluate, judge, or contest.

Some examples from my own discipline may illustrate this point. Nursing is a professional discipline explicitly mandated to apply knowledge to the resolution of human health and illness problems within society. While it may sometimes be difficult to explicitly delineate the boundaries of that disciplinary orientation,

that doesn't mean they don't exist. Early in my career, the common disciplinary wisdom was that violence against women was not a problem of specific concern to nurses and was more properly the domain of social workers and the judicial/correctional systems. Fortunately, many nurses pushed that boundary in their scholarship and application, and the relevance of violence as a health problem deserving of nursing attention would not be questioned today. However, simply because a disciplinary boundary can expand with new knowledge does not imply that it should be erased. Should nursing therefore justify involvement within any aspect of knowledge development that might conceivably involve people, since they have the potential to become ill? Or are there aspects of the study of violence that are more properly the domain of psychology, criminology, or policing? My favorite example of the discipline invoking its boundary occurred many years ago when a respected scholarly nursing journal published a research report on career-oriented women with tattoos (Armstrong, 1991). While a report pertaining to that topic might have been of some interest to various disciplines (within sociology, as an instance of new behavior trends; within psychology, as an instance of peer pressure or poor impulse control; within public health, as a potential infection vector), this particular paper described the phenomenon in a nonproblematic manner, such that nurses could not detect any link to clinical application potential. In subsequent letters to the editor, readers angrily charged the journal with abandoning relevance as a quality criterion for publication.

This idea of disciplinary relevance crosses all disciplinary boundaries. As humans blessed with the gift of infinite curiosity, academics are capable of being intrigued by ideas that are not central (or even marginally related) to their disciplines. Sometimes the insights derived from "being in the world" in this manner do actually inform and enrich our disciplinary scholarship. However, abandonment of "the discipline" slides us into the more-fuzzy domain of knowledge for knowledge's sake. Detached from our disciplinary histories and allegiances, we begin to lose our grip on the capacity to distinguish good and bad science and right and wrong ideas. Because of this, the orthopedic surgeon who develops a fascination for adolescent linguistic patterns because their teenagers have started to use foul language is no more a credible scientist within that field than would be the local police officer. Our understanding of the distinct nature of a scientific claim derives at least as much from the disciplinary source as it does from the relative truth or falsehood of the conclusion—even though very good ideas may sometimes arise from those without formal grounding in a field precisely because they aren't blinded by its assumptions. Thus we understand that the nature of a claim, and the expectations of how it might legitimately be taken up in society, is contingent on the foundations upon which it was made.

In my opinion, this stricture applies not only to a topic but also to a method and, in this context, to the kinds of methodological choices that one will make in order to do credible and valuable research. I have made a case that applying

disciplinary methods outside of the disciplinary project for which they were intended can create problems—either with the integrity of the methodological application or with the eventual relevance of the results. Similarly, selecting the research questions one will ask simply on the basis of a fascination for a particular method seems to have missed the point. As my colleague Margarete Sandelowski often puts it, we don't want to teach people to be grounded theorists or phenomenologists; rather, we must teach them to apply the methods that are appropriate to answering real and meaningful research questions within their fields. So, for example, I see a significant difference between working with the thematic analysis elements of grounded theory methodology to discern patterns within the shared experience of persons with a similar health challenge and using narrative analysis to deconstruct the structural elements of someone's illness story. What we learn using one method provides us with an appreciation for pattern; what we learn from another gives us insight into how people engage in "the telling." The point is that, because different approaches will lead to different kinds of knowledge, our methodological selection ought to derive from a deep understanding of what it is that we are looking for and why it is worth seeking. And that is what a disciplinary question reveals.

### *What's Worth Studying Qualitatively?*

The kinds of disciplinary problems or questions for which one might turn to interpretive description are those for which there is some justifiable rationale for generating or expanding upon existing descriptive knowledge. While one might argue that anything that interests us is worth describing, that seems a rather hollow justification for the expenditure of empirical energy and perhaps co-opting science toward selfish or frivolous ends. The more credible rationale comes from an understanding of how careful and rigorous description, expanding or extending upon what is already "known," would enhance our ability to engage with a particular phenomenon of some clinical or practical interest. I therefore quite seriously hold to the view that individual curiosity, on its own, should be insufficient to justify a scientific project within an applied or practice discipline.

At the outset of a study, it is wise to reflect on what constitutes a valid topic. Readers may well have noticed that, within the health literature, for example, there are numerous reports of qualitative studies that seem to have been generated for all the wrong reasons. It seems unjustifiable, for example, to generate a new qualitative study simply because one is unwilling to read what has already been written on the topic. Further, it is hard to defend a claim that new investigation is required simply because one's own distinct client population was not included in prior investigations or because the methodological approach differed from that which is now proposed. It seems even less justifiable to launch a formal study into a topic that has attracted your attention simply because it

affects you personally; indeed, the fine line between autoethnography and personal therapeutic work is one that I think demands very careful and thoughtful delineation and “location” within the existing body of knowledge. After all, as proponents of science, we qualitative researchers hold a privileged position within the world of ideas. If the products of our inquiries are to have empirical advantage in comparison to the products of journalism or creative writing, for example, it behooves us to ensure that our arguments for the value of each new study within the larger context of an evolving body of accessible knowledge are solid, coherent, and reasonable.

Although, in an earlier era, scholars tended to think that the distinct worldviews of qualitative and quantitative research were sufficiently mutually exclusive to preclude their coexistence, researchers in many fields—including health and other applied disciplines—have long since recognized that complex topics demand the application of multiple methods so that we can move beyond advancing method and toward advancing substantive understanding (Miller & Crabtree, 1999a; Regnault et al., 2017). While this cross-method capacity may occur in collaborative teams, each member bringing their own methodological expertise to the table, it increasingly can be found in the repertoire available to creative and innovative researchers. Consequently, the ability to discern and detect the kinds of problems and knowledge development trajectories for which a qualitative method will be the most meaningful option has become important and relevant to the discussion within an increasingly wide community.

It is rare that an applied qualitative study can be justified with the claim that “nothing is known” about the topic. Very likely, quite a lot will be known, but perhaps not within the scholarly circles to which the author is making reference. That which is worth studying qualitatively is argued most credibly when the next logical question in advancing disciplinary knowledge is one for which meaningful descriptions and explanations have not yet been well documented, for which the subjective or experiential elements of the phenomenon have not yet been reported, or for which the links between known elements and the larger experiential context have not been effectively made. And for good measure, what is worth studying quite often turns out to be that which has meaning within the mandate that has been granted to the discipline by the society that supports it.

### **Generating Questions in Interpretive Description**

Having considered the matter of what constitutes a qualitative research question and the intellectual heritage upon which such questions can be built, we turn specifically to the topic of how to extract direction for identifying, articulating, and framing research questions that will be consistent with the disciplinary objects and methodological possibilities offered by interpretive description.

**BOX 2.1 WHY FARMERS GROW TOBACCO**

Despite evidence of its health hazards and public health efforts to reduce consumption, the supply of tobacco remains dominant in many low- and middle-income countries. Researchers in Indonesia and the Philippines wanted to understand what motivates farmers to continue to grow tobacco leaf. They found that farmers not only perceived it to be a viable crop in terms of available markets and profitability but also understood that the financial terms available to those with a lack of capital made the tobacco industry a preferred option for accessing financial loans and credit facilities. The researchers concluded that understanding these institutional factors would be key to creating feasible alternative livelihoods for these farmers and thereby addressing the challenge of tobacco supply.

Appau, A., Drope, J., Witoelar, F., Chavez, J. J., & Lencucha, R. (2019). Why do farmers grow tobacco? A qualitative exploration of farmers perspectives in Indonesia and Philippines. *International Journal of Environmental Research and Public Health*, 16(13), 2330. <https://doi.org/10.3390/ijerph16132330>

***Finding a Researchable Problem***

In my experience, thoughtful members of applied disciplines generally have little difficulty generating lists of clinical curiosities and practice problems that might prove amenable to formal inquiry. However, in typical circumstances, these may initially be articulated as very loose and preliminary formulations for ideas that could potentially lead into researchable questions, but not without some considerable effort. While curiosity-driven inquiry has its place within the scheme of human learning, the process of moving general inquisitiveness into the scientific formulation of a researchable problem takes us into the literature (both scientific and otherwise) to see what established scholars consider known and not known about this and related concepts or ideas.

Fortunately, a critically reflective literature review by a thoughtful inquirer does sharpen one's grasp of the larger field and what can be said about it. Reading what others have written typically gets you increasingly excited about the value of knowledge and much wiser about the potential inherent in the various options for developing it. With the rapid proliferation of accessible knowledge, it is incumbent upon the researcher to demonstrate a logic trail through which decisions pertaining to the background resources you review have been constructed. Thus, you don't get to claim that something constitutes a researchable problem until you have done your homework to build the case that it isn't already fully known despite other attempts to study it and that it is, in fact, worth

knowing. Because this obligation is a hallmark of all formal research, immersion into the ideas of others becomes an inherent part of the process of formulating a good research problem on the basis of what may have begun as simply wondering about an applied practice matter. We'll say more about the literature review process in the next chapter.

### *Framing a Research Question*

The syntactic form that transforms the researchable problem into a research question is of critical importance, since it will shape your entire process and influence the degree to which your research project achieves its objectives. I would recommend that careful attention be put to this stage and that, although draft versions can catalyze the process, you suspend the final wording of both the problem statement and the formal question until a wide range of options have been considered.

An example might best illustrate the complexity involved in writing the optimal form of what often ends up looking like an incredibly simple sentence. If you had determined that it was justifiable and important to extend our current understanding of how some persons with disabling conditions become models of health promotion, you might experiment with the conceptual labels to which you were anchoring your question, considering, for example, the implications of choosing terminology to describe the population (such as “handicapped,” “chronically ill,” or “mobility-challenged”) and the descriptor (such as “wellness,” “optimal health,” or “quality of life”). By reviewing recent writings or attending professional meetings on the topic, you might familiarize yourself with the political, disciplinary, and ideological implications associated with the various choices, allowing you to select terminological options that will most effectively communicate what you think you are doing and for whom.

You might then work on the various options for linking those concepts within the grammatical form of the actual question, experimenting with strong associations (correlation? cause?) or softer ones (association? relationship?). Further, you might play with considerations of what the question looks like if grounded in different interrogative sentence forms. These can begin with a question (such as “what,” “how,” or “when”) or an auxiliary verb (such as “would,” “can,” or “do”). Since many of us become fixated upon certain initial framings of our ideas (sometimes the words that first entered our mind when we became conscious of our interest in the idea, or a neat turn of phrase that we have heard or read in relation to the topic), it can be very helpful to solicit the input of others at this stage, as their way of thinking might offer up alternative formulations we hadn't thought of. For most new researchers, this intellectual sharing takes its initial form in the graduate seminar and, with any luck, continues with valued colleagues and students throughout a research career.

Using this process, you should be able to generate a selection of good options for consideration before selecting the ideal question. From the above example, one can see that there will be profound differences between such options as “How do mobility-challenged persons define wellness?” and “What strategies and resources do highly functioning persons with disability identify as being most conducive to a positive quality of life?” An experienced researcher will be able to rapidly project the mind forward from each of these questions to identify what it would imply for all phases of the research process and for the eventual product. For the neophyte, it will be important to reflect on what the question implies as far as such matters as: Who would I be studying in order to learn this? What would I have to find out from them in order to begin to answer this question? How would I gather that kind of data? What categories or groupings of information does my question imply I am seeking? What would it matter if I were able to answer this question?

Typically, a reflective process such as this accomplishes two valuable ends. First, it does help you nail down a research question that is sufficiently well articulated to sustain a logical and coherent (not to mention manageable) study. Second, it opens up your awareness to the actual scope and boundaries of the question you have posed—what it is and what it is not (Agee, 2009). Since many of us enter applied disciplinary research with multiple questions, it can be painful to “let go” of some of the many additional hidden agendas we have when we enter a study. However, if we don’t, we run the risk of confusing agenda with interpretation. The power of a good question—and of truly understanding the nature of the question you have posed—is that it not only communicates to others the direction you are taking on a problem but also keeps your logic focused even when the complexity of the field makes the analytic process feel confusing. It becomes the direct line of sight from beginning to end of a study that keeps the whole coherent. And this capacity to maintain clarity of purpose is what will ensure that the final conclusions you report are credibly grounded in the empirical data that you produce. Although it may seem like a somewhat technical detail, the value of generating the ideally framed research question cannot be underestimated.

### *Clarifying Questions Amenable to Interpretive Description*

A somewhat facetious way of explaining which kinds of questions are amenable to interpretive description is that the approach is best suited to those questions that beg an inductively derived description of a phenomenon and one that deserves an interpretive lens. However, what that means cannot be fully appreciated until we engage in a somewhat more in-depth consideration of what description and interpretation entail before we can land on a beginning sense of what it is that would qualify a description as interpretive.

### **BOX 2.2 STREET BOYS IN NEW DELHI**

Drop-in centers have become a common approach to providing some measure of support for what has been estimated at up to 100 million street children across the world. Researchers in New Delhi wanted to better understand the role such drop-in centers serve and the contribution they could make to the physical and mental health, as well as the substance use, of these young people. They found that these kinds of centers were preferred over more formal health and social services because their daily struggles were diminished without the requirement to sacrifice the freedoms to which they had become normalized. Because staff were non-judgmental in this regard, they could access moral direction and an opportunity for a better life in a manner that positively influenced their health behaviors.

Nath, R., Sword, W., Georgiades, K., Raina, P., & Shannon, H. (2016). The impact of drop-in centres on the health of street boys in New Delhi: An interpretive descriptive study. *Children and Youth Services Review*, 68, 202–208. <https://doi.org/10.1016/j.chilcyouth.2016.07.017>

#### *What Is a Description?*

In the research sense, the term “description” is used to explain studies whose purpose is itemizing or documenting something that requires it—telling what it is that one observed (Sandelowski, 2000). The term explicitly differentiates this kind of inquiry from that which seeks to test a theory or prove a relationship and merely reports to us, using a set of inquiry conventions compatible with the intent, what can be seen when one examines a phenomenon. Qualitative description is typically understood to differ from that which is quantitative in terms of its degree of reliance on objective (especially numeric) data as opposed to those that are only accessible through human subjectivity. However, this can be something of a false dichotomy, and it may sometimes be more useful to draw the distinctions between the form of logic (deductive or inductive) upon which the method relies (Neergard et al., 2009). In general, qualitative description builds findings on the basis of inductive reasoning, while quantitative description builds them by deducing. Deductive reasoning moves from the more general toward the specific, so that one might begin with a theory and use descriptive techniques to confirm its applicability within a particular specific instance. An example of this might be directed forms of qualitative content analysis, in which existing theories predetermine the categories into which data will be organized (Hseih & Shannon, 2005). Inductive reasoning works the other way, building from specific observations of a thing toward broader generalizations about patterns or theoretical constructions of it. By its very nature, then, qualitative

description will be open and exploratory, in contrast to the more narrow and focused description that would be sought in the context of the more quantitative sense of the term. And although it is worth noting that applied qualitative researchers don't rely on inductive reasoning alone (Bergdahl & Berterö, 2015; Lipscomb, 2012), its prominence throughout the analytic process of qualitative inquiry is appropriately understood as its defining feature.

According to Sandelowski (2000, 2010), descriptive research has often been depicted as the least impressive or valuable form of both quantitative and qualitative research. Perhaps because of the quantitative tradition in which strong findings require experimental approaches, qualitative researchers in the health field have been reluctant to depict their work as "mere" description. Rather, they have often portrayed their work as phenomenology, grounded theory, narrative, or ethnography in order to ascribe to it some "epistemological credibility" (Thorne, Reimer Kirkham, & MacDonald-Emes, 1997), or what Wolcott has depicted as methodological "posturing" (1992). Like Sandelowski (2010), in advancing interpretive description as a methodological option, I am hoping to revitalize enthusiasm for description as a powerful resource in the knowledge development armament. While our approaches may differ on the relevance of disciplinary grounding to a good "qualitative description," we are both working toward a better level of intellectual honesty and methodological integrity in the scholarly products that are generated within our traditions. For the health field, description is and will remain an extremely important element in bringing phenomena to the awareness of our colleagues in creating an empirical basis from which new questions can be generated and for taking note of the manifestations of the complex and messy world of human health and illness.

### *What Is an Interpretation?*

When we use the term "interpretation," we are explicitly locating our studies of human social phenomena within a non-dualistic philosophical tradition (Crotty, 1998). In so doing, we distinguish our work from dualistic research approaches derived from assuming that the rational and empirical aspects of the mind stand in inherent opposition to one another (Garrett, 2013). Instead, we draw inspiration from philosophical underpinnings that capitalize on the perspective that many of the "realities" we seek to study don't exist "out there" as objective entities to be discovered but rather are more usefully understood as "socially constructed" through the subjectivity of persons who experience them (Mottier, 2005). This "interpretive turn" grew out of a tradition generated by such thinkers as Paul Ricoeur (1981a), Martin Heidegger (1982), and Hans-Georg Gadamer (1989), which focused attention upon the analysis of constructed meaning within subjective and intersubjective experience. Research drawing on these ideas involves cultivating the skill of apprehending experience as reflected in the perspective

of others while simultaneously accounting for the (very real) cultural and social forces that may have shaped that perspective. Because the point of such research is not simply to interpret action through the motivations that are accessible to subjective consciousness but to concentrate on the experiential context within which those actions evolve and become meaningful, inquiry involves a dialectic that has come to be known as the “hermeneutic circle.”

Although many qualitative health researchers have drawn heavily on the insights of these authors (as they do on the excellent work of the full range of social science methodologists), it remains important to remember that these approaches to inquiry were developed to address the very specific intellectual challenges that were at the forefront of thought within distinct disciplinary groups at particular points in time. Because of this, full adherence to the methodological requirements of many of these foundational sources draws one into a different sort of conversation and sometimes away from the one that generated the health research question in the first place. So, for example, although an appreciation for the dialectic between power and oppression can become an exciting focus of intellectual curiosity, it may be more suitable for developing grand theorizing than for trying to resolve the day-to-day problems of members of society made marginal by structural barriers. Thus the “interpretation” that has evolved within the qualitative health field, while informed and stimulated by these marvelous alternative “standpoints” from which to examine problems, still relies upon the more practical, analytical “so what might this mean?” form of interpretation that extends description beyond documentation and into sense-making (Benner, 1994). Norman Denzin has elaborated an action research method, “interpretive interactionism,” as an explicit approach to interrogating the interrelationship between what he calls “private lives and public responses to personal troubles” (1989, p. 12). His approach begins and ends with the biography of the researcher and generates thick descriptions and epiphanies that contribute to a better understanding of how we socially construct power, knowledge, history, and emotion (p. 19). Since this technique capitalizes on “auto-reflection” (to use Denzin’s term) and theoretical deconstruction, it too is limited in the utility it will have as the guide to methodology for the majority of applied qualitative inquiries.

### *What Makes a Description Interpretive?*

In the applied world of the practice disciplines, knowledge in a firmly antirealist tradition would be problematic. We need to accept, for example, that pain exists, even as we recognize the powerfully social nature within which it is felt, understood, and expressed. Thus, what the interpretive description approach considers “interpretive” takes inspiration from the formal interpretive hermeneutic

tradition without becoming a full-fledged adherent. It recognizes that the applied research mind tends not to be satisfied with “pure” description but rather seeks to discover associations, relationships, and patterns within the phenomena it is describing. As Sandelowski explained it, research is not “mere celebration, as opposed to interpretation, of data” (2010, p. 83). When we qualitatively describe a clinical case, for example, we do so not simply for the documentary value of having recorded it, but because of the inherent assumption that there may be other cases out there that bear some meaningful similarity, and that by making this particular case accessible, we move one step closer to useful general knowledge. In health research, for example, we therefore inherently work within the world of studying instances of a thing and integrating what we learn about them with our reflective clinical reasoning process, searching for underlying meanings that might further illuminate what is happening and develop a deeper appreciation toward what would ultimately be the optimal clinical response (Crabtree & Miller, 1999a).

In this way, interpretive description reflects a kind of mental attitude that is consistent with at least a significant proportion of the applied questions that might be amenable to qualitative description filtered through a disciplinary lens. It suggests that there is inherent value in careful and systematic analysis of a phenomenon and an equally pressing need for putting that analysis back into the context of the practice field, with all of its inherent social, political, and ideological complexities. Thus, it challenges the scholar to look below the self-evident within the practice phenomenon under consideration—to document patterned and thematic insights derived from examples of an entity and to reconfigure what is found into a form that has the potential to shift the angle of vision with which one customarily considers it.

To achieve this aim, interpretive description research questions should ideally be articulated in such a manner that they extend our reach beyond generic qualitative description, which might typically reflect question syntax on the order of: *What is happening here? What are the dimensions of the concept? or What variations exist?* They should also strategically avoid any language signifiers that have come to be so firmly aligned with conventional qualitative methodological traditions, such as phenomenology’s classic *What is the lived experience of...?* or grounded theory’s *What is the basic social process of...?* Of necessity, interpretive description questions must also avoid language that implies formal causation or explanatory pretensions (prediction, control, evaluation), for these become the domain of a much different kind of inquiry. Rather, when we frame a research question in a form that reflects the aim of interpretive description in the applied contexts of our various disciplines, we are aiming to uncover that which is accessible through the data sources available. And we are positioning our question such that the answer to it might fit back within the framework of

our disciplinary knowledge. Therefore, the syntax of an interpretive description research question might look more like one or more of these examples:

- *What situations in daily life pose a challenge for caregivers of persons with progressive cognitive decline?*
- *What perspectives and experiences of persons providing services to migrant workers could inform our understanding of the challenges this population sub-group is facing?*
- *How can we better understand the experience of families when circumstances prevent a desired home death for a loved one with advanced cancer?*
- *What geographical, physical, and social contexts influence the experience of older rural citizens seeking assistance with chronic disease management?*
- *What inspires a family physician to specialize in HIV/AIDS care?*
- *What factors do pediatric practitioners believe influence their practices and decisions in relation to autism spectrum disorder screening?*
- *How do young people seeking help on sexual assault use social media?*
- *How do unions understand factors surrounding return-to-work experience for employees who have been absent from work due to depressive disorder?*
- *What factors influence assistive technology access and service provision for individuals with disabilities from a particular cultural subgroup in the community?*
- *In what way might beliefs, attitudes, and prior experience shape first-year teacher education students' appreciation for the social determinants of learning skills?*
- *What attitudes, beliefs, and perceptions do patients report in relation to low back pain and the perceived threat associated with it?*
- *How do persons with multiple sclerosis interpret and explain the influence of exercise on their fatigue?*

Alternatively, you might consider working with what has come to be a preferred research question format for many scholars using interpretive description: *What can be learned...from...?* This simple structural base for a research question allows you to enter a field based on a clear depiction of the phenomenon or experience you have in mind as well as a purpose for which you seek to engage in this learning. It allows you to declutter your research question from implied associations or causative relationships within the wording that might trip you up in the course of your study or lead you to forget the boundaries in what you can legitimately claim to have found using this form of inquiry. So your question might look something like this: *What can be learned about preferred practices in family bereavement support from family members of persons who have recently chosen a medically assisted death?*

Over the years, I have heard from a number of researchers doing a qualitative study for which they have developed insight about problems with the syntax or terminological choices within their research question only when they are well into their data collection and analysis processes. This can occur when you have selected a methodological approach that does not fully fit the applied nature of the issue you set out to study, or when your intensive reflections in the course of conducting the research have led you to better perceive the implications of the way in which you originally articulated what you thought you were seeking. Although it can seem like cheating or sloppy scholarship to change your question midstream, I believe that the higher priority is to ensure an integrity of purpose throughout your study. So, if you recognize that a better wording for what you have actually been investigating all along would bring that clarity of purpose, then it may be appropriate to acknowledge and rectify that—if not backtracking to correct the issue, then at least explaining it in your critically reflective notes and in your research report. Asking the right question is actually quite a complex conceptual process (Armour & Macdonald, 2012), so it is not at all surprising that the hard-earned insights arising from the doing of research can bring more dimensions of that complexity to light. And continuing to battle with the wrong question may detract from the ultimate value of your research product.

Achieving the alignment between a question and the methodological tools with which it will be answered is the most fundamental of research skills and, unfortunately, one with which so many qualitative researchers have encountered difficulty. Interpretive description is designed to mimic the interpretive mental attitude that is the hallmark of the reasoning processes of the applied practice disciplines in framing a question that makes logical sense. On the basis of such a question, the remainder of the study is projected forward using a similar perspective to work through the steps of decision-making around choices in the formal methodological traditions for sampling, data collection, data analysis, and interpretation. Using this approach, the researcher is invited to work within the pressing problems of their own disciplinary field and to generate credible and defensible new knowledge in a form that will ultimately be meaningful and relevant to the applied practice context.

# 3

## SCAFFOLDING A STUDY

Scaffolding a study sets up the initial position from which you will build out your design plan. Decisions you make in this stage can have a significant impact throughout the project. The scaffolding process feels something like preparing the ground upon which you want to put up a tent for the night. First, you need to survey the broad options—should you position it on high ground or low, near trees or out in the open? You may have some fundamental requirements (relatively flat, near the campfire) and some less pressing but still important considerations (angle of sunrise, proximity to neighbors). Taking all of these into account, you decide on the general spot and then survey it for the specific implications of how it will position your tent floor (are there rocks that you can't relocate? knobby tree roots in the way? swarms of nesting insects in that particular spot?). What you discover may lead you to rethink your initial location decision. Having determined the specific spot, you will want to comb the ground for sharp stones that may puncture your sleeping mattress or cover it with soft grasses to buffer natural bumps in the terrain. You may also want to trench the perimeter of the tent floor space to encourage an appropriate flow of drainage. Only then are you prepared to put up the tent, ensuring that each peg is in its proper place and each rope is appropriately taut. This exercise becomes natural to seasoned campers because they fully appreciate the implications of failure to go through each step in sequence. When the deluge of rain comes, as it inevitably will one night, the carefulness of this preparation will distinguish the camper in the soggy sleeping bag from the one who has a dry and enjoyable camping experience.

To find your way safely through the predictable hazards of an interpretive description research project, you have to know who you are, what you represent, and what you are trying to accomplish. In essence, you need to sort out

what intellectual positioning you are taking into the project; what assumptions, values, and beliefs they represent; what “facts” you are considering as known and not known in relation to the topic; and what it is that you’ll be seeking to find. In our early writings on interpretive description, we used the language of “analytic framework” (Thorne, Reimer Kirkham, & MacDonald-Emes, 1997; Thorne, Reimer Kirkham, & O’Flynn-Magee, 2004) to refer to the background knowledge and disciplinary orientation that one was taking into the study. We later recognized that the original language could be misleading, in that it conveyed the impression to some readers that we intended the data analysis to be explicitly guided by a predetermined conceptual structure. More recently, we’ve used the term “theoretical scaffolding” in reference to this aspect so as to de-link it from data analysis while sustaining the emphasis on the idea that you really are foregrounding the study with important scholarly positioning that will influence your course and direction through to the end.

There are two critical elements to scaffolding a study. The first element is the review of literature—the part where you come to know and draw conclusions about the “state of the science” in relation to the applied problem you are concerned with. This allows you to confirm or challenge your initial hunch that the problem is worth studying in the first place, gives you insight as to who has already studied it, how they have gone about it, what problems they’ve encountered, and what sorts of conclusions they have reached so far. The second element of scaffolding has to do with working out what it is that you will be bringing into your own study. This will require that you account for the aspects of yourself and your thinking that have brought you to this point. Such accounting will certainly include any theoretical “baggage” you have brought along with you to this point, but perhaps most importantly in an applied qualitative study, it will also require that you position your study within the disciplinary orientation that shapes what this study is meant to represent in the larger sense of evolving knowledge.

### **Conducting a Literature Review**

Literature reviews have changed dramatically over the course of my own career, and the skill of sorting through an increasing array of accessible sources has become a science in itself (Greenhalgh, Thorne, & Malterud, 2018; Snyder, 2019). While electronic indexing and retrieval systems have made it possible to access thousands of relevant sources very rapidly, they have created their own set of new challenges for those who aspire to becoming conversant with their field of study and to ensure that their own research efforts will be appropriately received within that body of knowledge. Beyond what we might consider general good practice as regards reviewing literature for the purpose of adding useful scholarly contributions to it—a process that is well supported by most

academic libraries and well referenced within the literature—the elements of interpretive description that play a role in shaping a literature review strategy have to do with its requirement for scaffolding, or locating oneself substantively, theoretically, and within a disciplinary orientation. Included here are some recommendations for aspects to consider in that context.

### *Finding Literature*

Using an electronic search engine these days, there are few topics on which the amateur sleuth cannot find thousands of sources within a nanosecond. However, the business of finding the right sources and being confident that one has a grasp on them is quite a different matter. One of the frustrations of many academic leaders within this current context is that we may have a generation of students who are brilliant at using electronic systems but spend no time in actual libraries. While this observation may reflect a form of sentimental nostalgia for how things used to be, I think it also derives from a conviction that the library used to signify a place for tedious searches and spontaneous discoveries. And they may actually have resources that are inaccessible via online search.

### *The Impact of Search Tools*

The world of knowledge is currently accessed primarily through “keywords,” and it is important to understand the limitations that this selection mechanism imposes. Keywords have been created within various disciplines to name the taxonomy of possible substantive subgroupings and to become the primary search vehicle. For keywords to operate in the intended manner, some agreement as to which terms will become “key” is reached. Since keywords therefore reflect the “standard” state of conceptualization within a field at any given time, they can be a force of resistance against the kind of conceptual (and concept-labeling) change that is characteristic of a dynamic body of inquiry. Unfortunately, because authors tend to want others to easily locate their work, they may be inclined to revert to keyword choices that don’t quite reflect what is new and different about their piece of the puzzle. Furthermore, most journals and referencing systems strictly limit the number of keywords that can be associated with any one piece of scholarship. Therefore, overreliance on keywords—especially when they produce large volumes of literature—can become an impediment to building a coherent scholarly literature review.

The ease of access to electronic databases also creates something of a barrier to the modern researcher. When thousands of sources can be accessed in seconds, it takes real courage to commit time and effort to seeking out what might or might not augment the study. What this means is that there is a preponderance of electronically accessible sources bolstering much of current research,

and the kinds of knowledge that aren't quite so accessible tend to be ignored. In my view, this does create a skew in what people are inclined to think about a field and can lead to problematic claims about the state of a science. I therefore encourage my own graduate students to develop a wide repertoire of search resources to augment what they are likely to find electronically.

### *Expanding and Refining Your Search*

First, you really do have to immerse yourself within the field while you are conducting a comprehensive literature search. While reading is an obvious starting point, there are many ways to augment that. If possible, try to participate in scholarly conferences in your field. Often a day or two of listening to other scholars with specialized expertise can be extraordinarily helpful in orienting you to current problems within a field, to the way in which various groups of scholars are attempting to resolve them, and to the ideas that are evolving, contested, or controversial. As you read, you will also find that you are able to refine your capacity to recognize patterns within the literature, familiarize yourself with common understandings and spot variations, and make note of the authors who have been acknowledged as having made leading contributions to that topic. Don't forget to read reference lists and work at detecting patterns in who seems to be regularly cited as foundational to the field, who tends to get cited when certain biases or perspectives are being advanced, and the breadth or narrowness of the range of sources that various scholars have been drawing from. This intellectual exercise may hurt at first, but consider it as a "warm-up" exercise for the pattern-recognition process you'll be using when you get to the data analysis phase of your research.

Second, there are disciplinary groundings that may be requisite to your understanding of why certain kinds of scholarship are evolving in the way that they are. Because we all inevitably read outside of our own discipline, we encounter ideas that may be open to considerable misunderstanding if taken out of context. While none of us can be masters in all disciplines, I think it behooves modern scholars to develop a reading familiarity with the basic elements and foundational concepts underlying the disciplines within which they are likely to read. The nurse drawing from research conducted by psychologists, for example, may not appreciate the subtle implications of language cues that signify foundational assumptions within a particular study, just as the psychologist may not be able to make sense of why the nurse researcher has assumed a practice utility to nongeneralizable findings. Fortunately, most disciplines have excellent "101" textbooks that are readily available in university libraries, and these can be an important beginning source of synthesis of the general history and structure of someone else's discipline. Often, a relatively quick review through the contents and introductory remarks will go a long way to "locating" a disciplinary

orientation. As an alternative, various course outlines for such introductory courses can be found with a quick online search.

A third approach is to explore what is known as the “grey literature.” When much of the literature is so readily accessible, it becomes quite easy to convince yourself that anything less accessible is unlikely to be important. Thus, dissertations, policy reports, government “white papers,” consensus conference reports, and other forms of important understanding can be prematurely dismissed. Fortunately, we are seeing rapid developments in the development of new grey literature databases and search options that may help ensure you don’t miss key documents that could be quite relevant, especially to the policy aspects of your field (Bonato, 2018; Mahood et al., 2014; Paez, 2017). While an abbreviated search may be reasonable in the case of smaller studies, those doing doctoral dissertations or substantive programs of research on a topic will want to have an authoritative confidence that you really do know what is going on in your field and have a solid grasp on its history and trajectory. For this reason, you will want to ensure that your search is as extensive as is humanly possible and take the extra trouble to track down and reflect on these potentially relevant non-traditional sources.

This brings us back to the library. Although the tedium of the manual search process had its drawbacks, it did create a climate in which the old-school researcher was inclined to maximize efficiency by glancing through journal tables of contents over a period of several years and to gaze at bookshelves within the same “region” as the books one was specifically seeking. These kinds of focused engagements often created the context in which new discoveries were made, tangentially related but fascinating knowledge was brought to light, and the mind was stimulated by the pervasive atmosphere of ideas. Many scholars have found that certain books just “leapt off the shelves” or that certain articles unrelated to what they thought they were searching for triggered a new and productive line of thinking. Thus, the library experience remains one that is precious to an earlier generation of researchers and which many feel should not be lost.

### *Sorting and Organizing Literature*

Once you have located sources (an operation that never ends in the dynamic and evolving research world and operates in an entirely iterative manner with the organizational process), you have to decide what to do with them. In this, you will likely be guided by your research problem or question that is forming in your mind. Of course, one’s initial priority is typically trying to determine whether someone else has actually conducted the exact study one is anticipating doing, and so one organizational strategy is to sort the sources into the degree of proximity (conceptually, methodologically, or chronologically) to one’s specific focus.

As you make a series of choices about literature to select or reject in this manner, you will likely find yourself swayed in various directions regarding what is and isn't relevant. It is quite important to keep notes on the decisions you make (not necessarily in reference to specific sources, but to groupings of them) so that you can retrace your logic later in the event that you need to expand your review beyond the more-narrow scope you may have initially set. While some may find themselves prematurely rejecting sources that don't seem directly on target because of a desire to manage the volume of material, others will find that they are reluctant to put anything aside for fear that it may become useful at some point in the process. By reflecting on what sort of mental attitude you characteristically hold in relation to this part of the process, you may well reveal an important insight about how you'll sort and organize data once in the field, and so it can be informative to pay careful attention to and reflect on these personal matters of process.

There is no question that setting boundaries on what you will actually use is necessary in this age of information explosion. And how you set those boundaries is a matter of considerable variation. While a prescriptive guide that will suit the needs of all studies is inconceivable, some general guidelines may help as you create and document your own decision trail.

First, some authors limit their searches to current knowledge, such as research conducted over an arbitrarily chosen time period, such as the most recent five-year period (since this is easily accomplished via database filters, it is easy to understand the appeal). While this can be a useful first step to ascertain what's going on at the moment, I'd strongly suggest that you avoid this as a general search strategy. Most fields of study have an important history and a trajectory—who first used a certain conceptual term to reference a particular set of ideas or observations and what prompted that first usage, which disciplines or academic “camps” seem to have taken it up, what competing conceptualizations have emerged since it was first introduced, and so on.

While you might gain some impressions about these historical developments from the introductory and literature review sections of more recent authors, it will be important to judge for yourself from the primary and subsequent material. Unless you have access to a full understanding of what went into the making of a literature review of any published author, it is unwise to take their claims about the literature at face value. There are countless documented instances of misinterpretations of original sources that have been repeated over and over by subsequent authors, and you will want to ensure that future readers will not identify you with that form of sloppy scholarship. Indeed, ensuring that you have accessed and read the primary sources upon which your study relies is a hallmark of good science.

Another temptation can be to limit yourself to certain journals—most typically those within your discipline and with which you have some familiarity. While

this might be appropriate if your topic is explicitly and exclusively disciplinary knowledge development, this kind of limit on an applied topic about which others might well have written could significantly reduce your credibility in the field. One way to think this through is to look through a few sources within a related discipline to ascertain the way in which that discipline is dealing with the issue. You may be able to determine that, for example, in relation to your specific health-related topic, there is a current lively debate going on within social anthropology, but the psychologists tend to have coalesced around a particular narrow perspective. In general, it becomes important not to discount what might have arisen from other disciplines until you've done at least a cursory sampling of it and developed a feel for the flavor of the product.

A third option that some people select is distinguishing research (data-based) from non-research literature. Again, doing so can be helpful in orienting you to who has been studying what, but you may miss out on some important synthesis papers or informed reviews that would help you considerably. Indeed, if systematic reviews, critical literature summaries, or other similar kinds of writing are available to you—either directly on your topic or on closely related topics—you will do well to read and consider them. However, do pay close attention to the procedural choices that may have excluded important bodies of literature from consideration for the specific purposes of that review so that you can fully understand what it does and does not represent. Far too many published systematic reviews grossly oversimplify the available body of knowledge that is out there and make unsupportable claims about the relevance of their conclusions (Thorne, 2024).

A variation on the theme of delimiting your search is to select studies that are qualitative rather than those that use combined or quantitative approaches. This strategy may have seemed sensible in an earlier era in which the two “paradigms” of research were considered antithetical, but it is counterproductive in the current context to lack familiarity with the wider body of scholarship into which you are attempting to introduce new knowledge. While all researchers will have certain methods and traditions within which they are more comfortable reading, it is important to possess at least a general reading understanding of the full range of knowledge generation going on in the field that is the focus of your research. As you sort and organize, you'll become well aware that, among scholarly journals, there can be a wide range of formats and quality criteria. You may wish to familiarize yourself with the most high-impact journals and those whose editorial review processes are most rigorous so that you can add another perspective to how you begin to configure your interpretations of what might be considered strong or weak, wide or narrow, relevant or less relevant research within the field.

Using current search techniques, the most readily accessible information about most scholarly papers is the title and abstract. Abstracts have become an

excellent tool for the initial sorting process, in that they can provide you with sufficient information to know whether a paper is likely to be relevant to you, and if so, what “grouping” of relevant knowledge it will most likely contribute to. However, it is essential to understand that the abstract is not a substitute for the full paper—a point that all who have generated abstracts for their own studies will appreciate. While there may be occasions on which reference to an abstract alone would be sufficient (such as when you are providing a list of “kinds” of study, without commenting on their nature or quality in any way), all sources that have any potential utility in scaffolding your own study must be read in the original. Most academics have access to libraries within which this is easily accomplished electronically. In more challenging circumstances, if there really is no library access available to you, sometimes you can locate a paper by contacting the author directly for a “reprint.”

### *Interpreting and Writing Up Your Literature Review*

Typically, newer researchers need assistance with figuring out how to deal with the mountains of information that they have accessed. While one might long for a mechanistic and technical way to manage it, there is absolutely no substitute for interpretation and reasoning in this stage of the process. It is therefore important to think about the kind of literature review that you are trying to produce and to transform those sorted and organized piles of sources into a logical sequence of ideas (Galvan & Galvan, 2017). A critical aspect of this step is to keep in mind your research question. While it may change or become refined before the end of your literature review process, it will be the instrument that keeps you on track and prevents you from shifting away from the core focus and onto the attractive side issues that you are certain to find within the literature.

### *Options in Writing a Literature Review*

Having immersed yourself in the literature, you will be well aware that there are multiple available options for conceptualizing your literature review and writing it up. Therefore, an early step must be to clarify in your own mind what kind of a literature review suits your purpose, and you will find a range of resources available as you think this through (Couglan, Cronin, & Ryan, 2013; Efron & Ravid, 2019). While there may be practical considerations to keep in mind (such as the expected standards within your discipline or the programmatic requirements if you are conducting the research for a graduate degree), the kind of literature review that will best support an interpretive description study is one that:

- *grounds the study within the existing knowledge,*
- *offers critical reflection on what exists and what does not, and*

- *offers interpretive commentary on the strengths and weaknesses within the overall body of knowledge.*

In some disciplines, particularly those dominated by a more conventional scientific ethos, the expected form of a literature review is to write up, in a logical (usually chronological) sequence, a summary of key design elements of each of the related studies and then to attempt to expose their weaknesses. The conclusion of this kind of literature review tends to be that there have been flaws in the approaches of all prior researchers, and this new study is designed to correct them. While that is a useful logic model for the kind of science for which it is intended, it is quite inappropriate for the requirements of an interpretive description or any other qualitative study for that matter.

In recent years, particularly with the increasing popularity of manuscript-based dissertations in which the publication potential of the various dissertation elements becomes a primary concern, many qualitative researchers are choosing to preface their study with a systematic review of some sort. While a scoping review format may provide for including a wider range of material types within the systematic literature review (Munn et al., 2018), all such reviews are based on setting up tight exclusion criteria and therefore may well miss a great deal of what could potentially be crucial to your capacity to demonstrate a broad and deep understanding of the complexities of the scholarly tradition in your field (Cornish, 2015). Therefore, if you decide to conduct a systematic form of literature review as part of the theoretical scaffolding for your study, it will be important to also take the time to engage in a more critically reflective or integrative discussion of the relevant available literature.

Generally, the literature review that supports the need for an interpretive description study will be one that carefully documents and explains what is (or seems to be) known and the nature of the inquiries upon which we have come to that knowledge. While it is quite likely that you have entered the field because you suspect there is more to be known, the best justification for additional study will derive from thoughtful and respectful consideration of what scholars (and others, including applied practitioners) have been doing in relation to the topic, what methods and approaches they have been employing in order to try to ascertain better understandings about aspects of the problem, and what kinds of understandings they have been able to craft from those attempts.

### *Orienting the Literature Review to Your Research Problem*

An important consideration in writing a literature review, no matter what kind of review you decide on, is the matter of conceptualizing or grouping bodies of literature and describing sub-groups or themes within it. In general, you are likely to find that some aspects of the literature are best dealt with as “bodies”

of literature, in which case a few exemplar citations would suffice to describe the whole, and others that may be better addressed by describing individual contributions. The kinds of literature that may well be summarized fairly generally will be by groups of authors who have been following a similar inquiry path, communities of scholars who have taken a particular stance on an issue, or even disciplinary groups that have formed coherent perspectives or orientations to the topic. As with all aspects of inductive reasoning, it may take you some time in the literature to get a “feel” for which are the ideas of common knowledge within the field that you could reference summarily and which are the ideas that are sufficiently novel or controversial to warrant more detailed attention. Depending on the nature and substance of the available literature, you have a number of options for organizing your material, such as chronologically, by discipline, by theoretical perspective, by method, or by proximity to the actual applied or practice issue at hand.

Before deciding on your overall organizing structure, you’ll want to consider what kind of an argument each of the available sequencing options could build. For example, a chronological sequence would be appropriate if there has been a direct line of development from the initial research to the present day, and your study is explicitly designed to build upon it. However, if your study is designed to flesh out our understanding from the perspective of those with experiential knowledge as to why there are major discrepancies between disciplines or perspectives on a topic, then you are most likely to illustrate that most effectively with a disciplinary or perspectival sequence. Ideally, you will be able to identify multiple possible structural options, consider what the implications of each will be in terms of where you are likely to end up, and make an informed choice based on your sense of which will make for the best logical argument in scaffolding the study you intend to embark on. And by critically reflecting on options instead of opting for the most convenient or self-evident approach, you will also be warming up your mental muscles for the thinking steps that will be required when it comes time to structure and write up your study findings.

### *Concluding the Literature Review*

The strategic objective for which a literature review is enacted is setting the stage for a good argument that further research is needed and that a study using the general approach you propose would make a valuable contribution. If you have effectively organized and sequenced your literature review to build logically to this conclusion, you are well on your way to the next step of actually articulating the design specifics.

If the field seems to be one in which knowledge is well established and accepted, then you will have to be able to identify at least one problem associated with accepting that understanding in order to justify the need for your new

study. Often, researchers entering the field will find that they have misinterpreted what exists until they've conducted the thorough literature search, and it can be discouraging to discover your topic is not as novel or urgent as you thought it might be. However, having read and reviewed the relevant literature, you'll also have paid careful attention to the conclusions that your predecessors have made as to the future directions for research that would advance the field. From these informed conclusions, you can very often find useful inspiration for refining your angle of attention on your problem or question so that it regains the relevance you need to remain motivated in your applied study.

If the field is one in which there has been relatively little study, you'll have to think about how you are going to justify devoting time and effort to the topic. It may be a concern that has arisen within the practice context but not yet reached the attention of researchers within the field, or it may be an issue that is sufficiently obscure or context-specific that it has not found its way onto the radar of the scholarly mainstream. The absence of prior study does not in and of itself justify the need for new research. Rather, your challenge will be to conclude your literature review with a solid case for this new line of inquiry, building upon what is known and not known in relation to similar topics and also upon what can be concluded about the importance of the issue within the applied practice domain.

In order for a literature review to substantiate the need for an interpretive description, it will have to conclude that there is something related to patterns within the realm of human experience (activity, behavior, perceptions, or ideas, for example) that would flesh out what is currently known and allow us to better understand the phenomenon within the practice context. In other words, you must credibly conclude that there is relevant knowledge to which actors within the field have experiential access that has not yet been sufficiently documented, described, or interpreted to make that level of knowledge useful in some manner to your discipline's practice or project. Essentially, you need to establish what we wish to know, where that knowledge may reside, and—most important of all—why it matters.

### **Clarifying the Theoretical Forestructure**

The second element of scaffolding a study has to do with “locating” yourself as a researcher within the field and the theoretical world that surrounds it. In contrast to the motivation inherent in most quantitative designs, which seek to neutralize any influence that the researcher might bring to the research process, interpretive description, like all qualitative approaches, explicitly recognizes and capitalizes on the researcher as “instrument.” This does not mean that you get to do whatever you feel, but rather that your actions and thinking will play a meaningful role in shaping the nature and outcome of your inquiry and in determining the extent to

which your eventual research findings will or will not make a contribution that others in your field deem credible. So you need to thoughtfully account for them.

There are several linked elements to this theoretical forestructure:

- *locating your theoretical allegiances on entering the study,*
- *locating yourself within a discipline, and*
- *locating your personal relationship to the ideas you hold.*

Each element represents an intellectual exercise you need to engage in as part of writing up your research proposal (and deciding what to put into it) before you enter the field to collect data. While there are few absolute rules around for-structuring, the key is an integrity of purpose not only within yourself but also between yourself and your project, and with your eventual audience. Because, as a researcher, your mind and your personhood are integrally involved in what you will accomplish, it is only with some honest critical reflection on these elements that you can ensure that the research products you generate are true to your purpose and become meaningful empirical contributions.

### ***Locating Theoretical Allegiances***

Because interpretive description locates itself outside of the social science theoretical tradition, it does not hold with the conventional requirement that all studies must be explicitly positioned within one or another formal theory. As with “normal science,” in which the legitimacy of a research question is entirely dependent on its relationship to those that have gone before, the social science tradition has evolved in such a manner that the theoretical links between scholarly projects must be made explicit (Sandelowski, 1993b, 2000). As Paley (2025) points out, this expectation has evolved in the qualitative research world into an orthodoxy within which the “necessary preliminary” of articulating metaphysical underpinnings becomes something of a performative exercise. Therefore, in a social science proposal or report, we typically see language that “cues” the informed disciplinary reader into understanding the tradition, including which scholars are being followed and which strands of thinking are being taken up (Bradbury-Jones, Taylor, & Herber, 2014). This theoretical positioning ensures that the findings will contribute to a larger theoretical project of concern to the discipline.

For example, when authors reference “symbolic interactionism” as their theoretical positioning, one recognizes that they are working in the tradition of Mead (1934) and Blumer (1969), emphasizing interpretation as an essential human response, rejecting behaviorism and other branches of psychology, and explicitly concerned with the signs and symbols with which people signify meaning within their interactions with one another (“semiotics”). Further,

one might rightly assume the intention to use grounded theory methodology to uncover what is assumed to constitute a “basic social process” as yet not uncovered or articulated so that we can more fully understand that aspect of human meaning-making through interaction. If the research report did not take up these issues in a serious manner, the reader might consider the author to have inappropriately “tossed in” the reference without understanding its meaning to the target audience. In contrast, while authors such as Blumer and Mead contributed quite broadly to knowledge and one might justifiably wish to reference them in relation to different ideas, their association with this strand of thinking has become so entrenched that it would require firm and explicit negation of that association to communicate to the reader that the common linkage is not intended. Thus, one does not enter into the business of citing authorities lightly, since it is within these citations that the astute reader will discern theoretical affinities, contradictions in perspective, and signals as to the tradition to which the new inquiry is intending to contribute.

Often, as with the above example, the theoretical cues reflect methodological as well as substantive information. For instance, when language such as “lifeworld” or “lived experience” is used to frame a study, readers will normally anticipate a phenomenological orientation and a methodological option that is consistent with that tradition. While ethnographers certainly gather data on lifeworlds and lived experiences, they may refer to these concepts using alternative linguistic signifiers. To complicate matters, often scholars within one specific scholarly community will immediately recognize certain terminology as “loaded” with meaning while others in different academic groupings may not. Your job is to build an understanding of the academic culture into which you are attempting to make inroads, to learn to speak its language fluently and intelligently, and to begin to appreciate how the assumptions and beliefs underlying its linguistic cues may be similar or different from those of other knowledge communities (Jones, Torres, & Armino, 2022). Although it can be quite tempting to “toss in” obscure terms or intriguing references you may have encountered in your reading, it is important to recognize that, unless you really do intend to take them seriously and have them explicitly guide design and application decisions in your research, their inclusion in a superficial manner may harm your standing with important audiences. A casual reference to Michel Foucault, for example, might communicate to informed scholars a very explicit set of understandings about the dynamics of knowledge, power, and social control that one would expect to see showcased prominently within the findings. If you don’t intend that, or aren’t intending to take up Foucault’s ideas in a well-informed manner, you might do well to avoid complicating your life. Thus, being as aware as possible of the language cues within your field and their implications for communicating your relationship

to various theoretical perspectives becomes an important part of crafting a credible research proposal and project.

### *Locating Your Study within Sociopolitical Projects*

Increasingly, scholars are eager to position their applied and practice inquiries within sociopolitical movements, such as Indigenous ways of knowing, equity studies, community-based participatory work, and so on. Because it does not pre-determine an explicit theoretical positioning, interpretive description has worked well for studies of this nature. What would be expected in such studies would be a clearly articulated explanation of the rationale for the positioning, the nature of the applied project that it signifies within the wider world of practice and scholarship, and the key thinkers that you will have in mind as you engage with your study.

You may find it useful to review and reflect on examples from the literature in which scholars have effectively aligned interpretive description with various sociopolitical positionings. For example, Brewer and colleagues (2014) used interpretive description in combination with a *Kaupapa Māori* research approach, which emphasizes decolonizing practices, to create transformative knowledge about how power shapes the experiences of New Zealand/Aotearoa Māori persons with aphasia and their families. As an increasing number of scholars seek to work with and support other Indigenous knowledge forms deriving from many parts of the world, there may be opportunities for similar alignment. Australian scholars are exploring “Yarning Circles” as a way of prioritizing Aboriginal and Torres Strait Islander voices and the principles of relational accountability to co-create new knowledge about cultural safety in research and health services contexts (Kennedy et al., 2022; Rix & Ritumah, 2020). Similarly, Ferrazzi et al. (2019) describe the integration of *Ajiiqatigiingniq*, which entails principles of cultural knowledge and consensual decision-making among Inuit in the Canadian Arctic, as a means for using research to overcome the historic marginalization of colonizing Western health research traditions for this population and to seek levels of agreement about disputed or conceptually unclear subjects through inquiry. If such approaches are consistent with the populations you are studying and/or the questions you are asking and you are hoping to use them as the scaffolding of your study, a careful and thoughtful grounding in their history and traditions would be essential, as would an established relationship or collaboration with knowledge keepers of those traditions. One can certainly imagine the havoc that could be created by applied researchers without credibility as cultural representatives claiming to be taking on this work. That said, there is certainly a great deal that all of us can learn from reading, reflecting on, and drawing upon ideas from these important and re-emerging traditions, especially as we take up the study of righting past wrongs.

### **BOX 3.1 INTEGRATING INDIGENOUS WAYS OF KNOWING INTO HEALTH CARE**

Under the guidance of an Aboriginal community advisory group, these health professional researchers wanted to better understand how Aboriginal culture and spirituality might be integrated into care provision within residential aged care facilities in Australia. They integrated Aboriginal inquiry principles into an interpretive description study design to access the perspectives of Aboriginal and Torres Strait Islanders who resided in such facilities, listening to their impressions and interpretations with respect to both organizational and care provider capacity for such care. On the basis of their findings, these researchers were able to generate recommendations for general care protocols that would accommodate Aboriginal residents' cultural knowledge into care practices and support care providers in the development of cultural safety competency.

Sivertsen, N., Harrington, A., & Hamiduzzaman, M. (2019). Exploring aboriginal aged care residents' cultural and spiritual needs in South Australia. *BMC Health Services Research*, 19(1), 477. <https://doi.org/10.1186/s12913-019-4322-8>

Beyond Indigenous ways of knowing, scholars are increasingly keen to situate their work within the communities they seek to serve and conduct their research in a manner that is liberating or emancipatory. As Ocean and colleagues (2022) demonstrate, interpretive description aligns nicely with such aspirations. Similarly, Kassam (2024) critically examined the available body of literature on the application of intersectionality theory within community-based research as a means to address inequities within marginalized communities, concluding that interpretive description represented a strong fit with its aspirations.

As efforts to more deeply and fully understand the phenomena of our applied world unfold, we can expect a proliferation of new challenges. For example, Le Grange (2018) points us toward the possibility of a (post)qualitative research informed by (post)humanism and Indigenous philosophies that will enable us to consider that water and land have agential capacities and that their actions may have real effects on the human experiences we are studying. As St. Pierre explains, post-qualitative inquiry defies methodological and theoretical positioning—"it just is." And it requires that researchers mobilize "as much theory as they can to complicate their inquiry and not rely on methodology to make it easy" (pp. 6–7). "If you really take a look at the social science research methodologies that have become almost sacred, they look strange indeed—way out there, in fact—and I truly don't believe they can accommodate the new post-humanist onto-epistemologies" (p. 7). As scholars in the applied fields

become increasingly intrigued with and take up these kinds of ideas, perhaps some of the philosophy of interpretive description will serve as a bridge between conventional and newer forms of studying our world.

### ***Locating the Disciplinary Orientation***

Although the issue has long attracted controversy, and there are diverse philosophical standpoints within the tradition itself (Schwandt, 1997), phenomenological frameworks typically required that the researcher strive toward *epoché*, making every effort to set aside preconceived ideas prior to entry into the experiential lifeworld of another. This “bracketing” or suspension of the “natural attitude” created the conditions for discerning the core “essence” of the phenomenon under study (Husserl, 1929/1975; Miller & Crabtree, 1999a). This idea has had tremendous appeal for those involved in the study of universally recognizable subjective experiences such as loneliness or grief. One can fully appreciate the value of ensuring that the researcher encounters such phenomena through the filter of research participants’ subjectivities rather than re-creating prematurely developed personal experiential “insights.” However, a naïve attraction to this idea has also led a number of applied researchers to presume that it can be legitimate to embark on answering a qualitative question without proper appreciation of the current state of knowledge affecting the field. This problem of the *tabula rasa* (or “blank slate”) is entirely inconsistent with the advancement of disciplinary knowledge within applied fields such as the health professions, and its misapplication has contributed to what others have noted as a misuse of phenomenological approaches in answering questions pertaining to human experience and meaning (Anderson, 1989; Ray, 1994; Schultz & Meleis, 1988; Thorne, 1991; Tufford & Newman, 2012).

Each discipline can be said to have what it considers its profound and burning question—the ultimate reason that justifies the existence of a scholarly community within that field of study. According to Michael Quinn Patton, sociology’s burning question is something like, *What holds society together?* For psychology it is, *Why do individuals think, feel, and act as they do?* For economics, the question becomes, *How are resources produced and distributed?* Biologists ask, *What is the nature and variety of life?* And agriculturists wonder, *How do we produce food?* (Patton, 2002, p. 216) Although Patton acknowledges that reducing multifaceted disciplines to a single question oversimplifies their inherent complexity, his point is that understanding the fundamental question that binds one’s own discipline together permits clarity and focus in distinguishing that disciplinary angle of vision from any other.

Having reviewed many qualitative studies for such purposes as metasynthesis, I have been quite intrigued to observe how powerfully disciplinary orientation creeps into the qualitative studies of researchers in the applied fields even

when the author seemed not to have intended to make it transparent (Thorne et al., 2002). It can be detected within the bodies of literature that are included in the review, the language that is employed within the report, and the characteristic styles with which the design issues are elaborated or obscured. Disciplinary orientation powerfully shapes thinking, enacting research, and the research product. However, although qualitative researchers in the applied disciplines have generally gone to great lengths to “locate” the specific theorists they have been reading and articulate the theoretical affinities they have formed, they have often overlooked the equally serious consideration of the influence their disciplinary orientation will have on their work, therefore neglecting to account for or accommodate a key determinant of its overall impact and quality. In that we now recognize that a disciplinary orientation not only shapes an angle of vision but also, potentially, some shared disciplinary “blind spots” (Meudec et al., 2022; Van Praag & Daenekindt, 2021) [I continue to search for a less ableist but equally evocative term], it remains important to critically reflect on the entirety of what you bring into a study in order to ensure its integrity.

The ultimate reason one does research within an applied profession or discipline is disciplinary knowledge development. Thus, recognizing the influence of disciplinary orientation becomes a fundamental component of the research, forestructure, and grounding within the applied fields. One’s very enthusiasm for a topic derives directly from disciplinary interest. The way in which a research question is framed reveals the nature of the problem the discipline would recognize as important. Many of the study design decisions you will have to make along the way will be explicitly informed by how your discipline thinks about the population or problem you are studying.

Conscious awareness that applied research occurs as a knowledge production act within a disciplinary orientation affords the researcher an epistemological positioning that inevitably shapes

- *what it is we decide to observe in the field,*
- *what we see when we make those observations, and*
- *what sense we are able to make of the observations as they progress.*

Further, the manner in which study findings are constructed, reported, and disseminated will be highly dependent upon one’s appreciation for how the disciplinary audience currently understands the problem in question as well as its capacity to interpret and act upon it. Consequently, interpretive description requires sufficient grounding in one’s discipline to be able to discern its scope and boundaries, its angle of vision on problems of concern, and its philosophical underpinnings in relation to what constitutes useful knowledge. This stance goes considerably beyond simply “owning up” to one’s disciplinary heritage.

In my profession of nursing, for example, disciplinary orientation plays out in a number of attributes that tend to make a study look like a “nursing study”

regardless of where it is published or presented. Qualitative nursing inquiry always involves a normative moral imperative in the sense that the problem to be studied must be justified as a clinically relevant instance that ought to be improved upon. It tends to favor individual interviewing as a primary data source, in keeping with the human connectivity that is so central to enacting professional practice (nurses never feel they have enough time with their patients!). In its depiction of findings, it steers clear of overgeneralization of pattern where that might obscure the sorts of contextual and sociocultural diversities one would encounter in the clinical context. And in drawing conclusions from any study, it assumes that ideas exist for the purpose of being put to some use to the ultimate benefit of patients or the systems that serve them (Thorne, Stephens, & Truant, 2016).

Although, to this point in the evolution of qualitative research methodology, it has not been particularly fashionable to explicitly position studies within one's understanding of an applied disciplinary orientation, as qualitative science evolves, I believe the importance of this aspect is becoming increasingly prominent. In recent years, there has been a lively discussion within the social sciences about how epistemological positioning works as an inherent part of the "machine" that constitutes a qualitative research enterprise (Bowleg, 2017). In keeping with the idea popularized by Deleuze and Guattari (1987) about the role of "plugging in" a researcher's epistemological positioning to make the machinery of data actually work in a particular way to create findings, social scientists are starting to encourage one another to go well beyond naming their theoretical framework to actually articulating the epistemological foundations that make explicit their worldview (Hook, 2015). In so doing, they acknowledge the integral role that such positioning plays in the conduct of their research practice and the nature of their research products.

Thus, an important part of restructuring an interpretive description study will be to thoughtfully consider its disciplinary nature, to reflect on the manner in which the study elements will align with the knowledge and practice of the discipline, and to sort out how that will be made apparent within the research design and eventual write-up. In the applied professional fields, our disciplinary orientation is our primary epistemological positioning, and as such it deserves to be accounted for in the way we articulate other positionings that are scaffolding our study.

Distinguishing one's disciplinary orientation from one's theoretical positioning can sometimes be a challenge, since disciplinary knowledge tends to come with certain basic assumptions or values that each discipline takes as a given. And of course, some of what we know about our disciplines is derived from what we might consider disciplinary theorizing. For example, a psychologist might wonder whether a cognitive or a behavioral approach would better serve the process of changing health behavior habits within certain populations. In order to gain clarity about the nature and scope of the intended study, it will be

important to sort out whether the study is about better understanding the clinical population through comparing two distinct intervention approaches or about better understanding the theoretical perspective underlying the intervention by testing it out on additional populations. If you don't differentiate between applied disciplinary and theoretical motivations as you scaffold your study, you may run into difficulties with integrity of method and design logic along the way.

### *Positioning the Researcher within the Ideas*

A hallmark of qualitative research is that it explicitly capitalizes on the person who is considered the “instrument” of the research. Consequently, the quality of the process and the product are inexorably dependent on the integrity of that researcher in accounting for the mechanisms by which the eventual outcomes can be judged (Lipson, 1989; Shaw & Satalkar, 2018). While academic and personal integrity have always been fundamental to the spirit of qualitative scholarship (Knafl, 1994), the integrity we are concerned with here is more an intellectual integrity in the sense of having “located” oneself—or the specific relevant elements that make up that complex self—within this particular research project.

Since interpretive description is designed as a method for those who wish to study problems whose origins are the needs of the applied or practice field, the disciplinary orientation helps us understand what the motivation for the study entails and what the potential audience for any new knowledge that arises from the study might be. While the impact of the study may not be limited to that audience, its particular needs are unlikely to drift far from the consciousness of the researcher and therefore deserve a formal place in the “positioning.”

Depending on the topic, it may be of considerable importance to further locate the specific kinds of concerns that contributed to the generation of the focus of interest in the first place. Were patterns observed among hospital patients with a particular condition? Did clinic staff begin to report a particular kind of family response to a situation? Were there particular kinds of clients who seemed less well served by standard protocols than others? These matters of the genesis of research inspiration are important to acknowledge in setting up a study since they will reveal something of the motivation and bias of the researcher and become a fixed point against which it becomes possible to determine whether data collection and analysis are either informed or skewed by these earliest conceptions.

The researcher may also have been powerfully influenced by certain ideas, theories, or inquiry approaches prior to or during the process of bringing the initial curiosity to the point of becoming a formal research question. Graduate students may well have been inspired by particularly charismatic teachers, clinical researchers by compelling new theoretical stances, or established scholars by the specific theoretical claims that served us well in prior studies. As human

### BOX 3.2 UNDERSTANDING HOW TO BUILD RAPPORT

Telehealth calls have become an increasingly important component of palliative care as services expand across communities in an effort to support as many people as they approach the end of life. However, beyond the context of in-person care, many health professional providers find it difficult to develop a sense of rapport and build trusting relationships with patients. These New Zealand researchers interviewed palliative care professionals to learn more about how rapport shows up in the telehealth context, including the strategic use of body language and approaches to listening with intention while also being mindful of potential privacy concerns. They concluded that a set of distinctive telehealth rapport-building skills can be learned, practiced, and mastered to increase the likelihood that patients and families are most likely to experience its benefits.

English, W., Robinson, J., & Gott, M. (2023). Health professionals' experiences of rapport during telehealth encounters in community palliative care: An interpretive description study. *Palliative Medicine, 37*(7), 975–983. <https://doi.org/10.1177/02692163231172243>

beings with inquiring minds, we are often quite susceptible to the most recent good book we read or lecture we attended. Thus, in the case of each of these issues, it is important to surface, acknowledge, and reflect upon what ideas we hold that may be influencing us in the design and implementation of this project.

We have already discussed why interpretive description explicitly distinguishes itself from qualitative research whose primary object is theorizing and therefore why it is most comfortable being situated within a disciplinary context. Because of this, it might be considered somewhat “atheoretical.” However, no human being is immune from theoretical influence (and bias), and therefore the way in which this susceptibility is handled involves explicit recognition and understanding such that the influence on the research remains consistent with integrity to an inductive reasoning process that generates findings that are well grounded within data.

In her discussion of the application of classic qualitative technique to qualitative description, Sandelowski helpfully distinguishes between full-on adoption of specific ideas and a less “pure” situation in which those ideas shape what she calls the “hues, tones and texture” of what we study (2000, p. 337). By differentiating between claims that are made with respect to whole perspectives and those that are made in relation to the specific elements that are being applied, she shows how drawing upon a range of methods and perspectives, even when apparently contradictory, can be quite consistent with solid qualitative inquiry. When we understand how to effectively convey our relationship with the ideas

we are referencing, we convey an integrity of purpose that will not be confused with misuse of methods or erroneous claims.

The important distinction between ways of communicating our particular relationship to ideas can be illustrated with the application of any one of the “standpoints” that increasingly appear within our qualitative research literature. For example, feminism is an idea that is commonly referenced in relation to aspects of health that involve gender (and also often those that do not). For the researcher entering a study on a women’s health topic, there is a significant difference between declaring oneself to “be” a feminist on the one hand and acknowledging that some aspect of feminist thought will have influenced one’s work on the other. Whether one is or is not a feminist in private life is not particularly relevant to the research project, unless, of course, it might facilitate gaining entry into the field, in which case its influence could become a significant limitation within the data analysis process. If one claims a piece of research “is” a feminist study, then one has made a commitment to a whole series of design and methodological claims (Thorne & Varcoe, 1988) that privileges a certain predetermined worldview over the perspectives that may arise within the field during the data collection process. However, if one claims that some aspect of the study has been “informed” by feminist thought (perhaps the importance of the question, the scope of the literature that has been reviewed, some specific design considerations), then the relationship to the theoretical idea has been presented in a manner that lends credibility to the research process and creates the conditions under which a high-quality interpretive description can be achievable.

Newer scholars in particular may experience a form of peer pressure to take up certain theoretical positionings in their work, almost as if omitting them would constitute a rejection of the values inherent in a theory. For example, intersectionality theorizing, first originated by Crenshaw (1989), has been widely popularized among scholars concerned with social determinants of health and matters of health equity (De Sousa & Varcoe, 2022). In some scholarly circles, failure to take up an explicitly intersectional lens in one’s work might be interpretable as a disinterest in de-centering the ideologies that have created and sustained the structural barriers that perpetuate inequities. These very real circumstances of one’s immediate scholarly community and of the intended audience of your research are well worth thinking through as you make these strategic decisions about whether and how you establish your alignments within your proposed study. Overall, I would encourage an integrity of purpose in deciding which ideas will become part of the theoretical reflections you express in the background to your study so as to make explicit the kinds of ideas that you think might have relevance for you as you engage with your research, in contrast to those you may be claiming as an actual framework underpinning your work—two very different relationships to theories. It is a hallmark of scholarly excellence to understand and critically reflect on the current strands

of thinking that are shaping your field of work, whether or not you position your specific study design within them.

In general, if ideas, thoughts, perspectives, or personal experiences are going to influence the angle of vision that you are taking into a study, it is always best to confess them and ensure that you appropriately manage and account for their effect. However, in this context, I must admit that I am not a fan of the overblown, extensive personal reflection that does sometimes appear in the write-ups of certain qualitative reports. One hopes that the researcher is primarily fascinated with the subject rather than the self, and the quality of the findings will be inherently suspect if there is too much of the author inscribed within the product. While there may be a place for autoethnography in the applied research world, readers of interpretive description (as with most qualitative studies) will be taking up your study because they share an enthusiasm for solving the clinical or practice problem, not because they want private information about your life and your experience conducting the project. So the appropriate “positioning” that you do in relation to your study will be that which is explicitly necessary to understand your motivations, your biases, and your consequent angle of interpretive inquiry.

By bringing together the conclusions about the field that you have drawn from your literature review and presenting them in the context of the theoretical, disciplinary, and personal forestructure that will be shaping both the design decisions and analytic maneuvers you will be making, you will have effectively created the conditions for scaffolding your qualitative inquiry. Using terminology and syntax with precision and clarity, you align the ideas you are working with in a manner that makes the intended meanings and relationships as transparent as possible. Your reader (that mythical “judge” we all have looking over our shoulder as we work) will then be appropriately informed as to what you—the research instrument—bring into the study and the manner in which that instrument will influence what will happen and what may be discovered. On the basis of this groundwork, you will be optimally positioned to build a credible and defensible interpretive description project whose conclusions follow logically from the original question you articulated and the study objectives that you set for yourself. The insights that derive from this positioning have the potential to be meaningful and relevant to the intended disciplinary audience whose problem inspired the work in the first place. You want to enter your study comfortable with who you are and what you’ve revealed about yourself and well-armed with the humility that it takes to realize that the extent to which you succeed in minimizing the unintended impact you have on the process of your research will in large measure determine your ability to produce a high-quality research product.

# 4

## FRAMING A STUDY DESIGN

As is evident from the discussion in previous chapters, interpretive description does not prescribe an exact way to go about a study, but rather represents itself as an operating logic within which high-quality qualitative studies in the applied and practice disciplines can be designed and enacted with meaningful results. In this way, it serves as a coherent organizing framework within which a range of various data collection and analytic strategies might be usefully deployed, assuming their use maintains a logical integrity throughout that is consistent with the explicit positioning and directional aim of the study. The excellent work of so many social and applied scientists to generate specific techniques, strategies, and mechanisms for such aspects as data collection, management, interpretation, and display becomes a wonderful resource for the researcher using interpretive description. What is required, however, is an appreciation for the implications of the techniques being considered—where they came from and what they are used for within their original context—so that informed decisions can be made and communicated to your intended audience.

Like most qualitative research methods, interpretive description arose out of an expressed need for an alternative way to generate certain species of knowledge. Not only was it an attempt to envision a future in which better quality qualitative studies could have greater impact on an applied field such as nursing, but its genesis was also motivated by the need for a strategy to legitimize the very fine research that was being produced within the discipline for which there really was no other name (Morse, 1989a). Like all of my colleagues at that time, I too had been constructing my research findings within design language that did not in its entirety fit my needs. In various incarnations of my program of research, I had used phenomenology, grounded theory, ethnography, and naturalistic inquiry as

the methodological tradition within which I explained how I conducted my study and articulated the way in which my findings emerged. However, none of these had proven a perfect fit and—if truth be told—I could see significant methodological flaws within my own enactment of these methods precisely because I was grounding my studies in applied practice issues rather than orienting them around advancing theorizing. By “naming” interpretive description as a disciplinary approach to qualitative research, my co-authors and I sought to create a point of legitimation for others who had similarly been wrestling with available methods. We did not see ourselves as generating entirely new or original design options; rather, we were trying to provide our colleagues with coherent and defensible justification for linking together the pieces of design steps that made the best sense to them as most suitable to meet the knowledge-generation needs of our applied disciplines.

### Foundational Underpinnings of Interpretive Description

In this chapter and the next, we will focus on issues of research design—the kinds of issues one needs to make decisions about in order to complete a research proposal and justify entering the field for data collection and analysis. As such, this chapter will not include an explicit design prescription but rather an invitation to readers to engage in an exploration of what some of the options might be for qualitative inquiry aligned with your own disciplinary problems. This form of inquiry will have several common features because it is bound by a common set of assumptions about human experience as it pertains to the mandate of the health and human service professions and about the nature and production of knowledge pertaining to those disciplines. Interpretive description studies:

- *are conducted in as naturalistic a context as possible in a manner that is respectful of the comfort and ethical rights of all participants,*
- *explicitly attend to the value of subjective and experiential knowledge as fundamental sources from which to obtain applied practice insight,*
- *capitalize on human commonalities as well as individual expressions of variance within an area of interest,*
- *reflect issues that are not bounded by time and context but attend carefully to the time and context within which human expressions are enacted,*
- *acknowledge a socially “constructed” element to human experience that cannot be meaningfully separated from its essential nature,*
- *recognize that, in the world of human experience, “reality” becomes multiple constructed realities that may well at times be contradictory, and*
- *acknowledge an inseparable interaction between the knower and the known, such that the inquirer and the “object” of that inquiry influence one another in the production of the research outcomes.*

Because they understand the world in this particular way, practitioners of interpretive description enter their studies assuming that a priori theory cannot encompass these multiple realities; rather, they recognize that theory that will help us understand a practice phenomenon must emerge from or be grounded in that phenomenon.

These ideas, many of which are informed by key axioms within the naturalistic inquiry tradition of Lincoln and Guba (1985), represent the epistemological standpoint of interpretive description. Although interpretive description studies may differ one from another with respect to certain techniques for data collection and approaches to data analysis, these philosophical underpinnings ensure a coherence that will distinguish an interpretive description study from one that is derived from blended approaches or from generic qualitative description (Neergard et al., 2009).

### Elements of Design

Interpretive description studies provide a thematic or integrative description of a phenomenon of applied or practice interest and do so in a manner in which the disciplinary objects of the study are made explicit within the interpretations. To achieve this, interpretive description designs will, in various ways, search out and explore features or elements of an issue but will seek to render an understanding of them that honors their inherent complexity. In so doing, they will be structured so as to ensure that the intrinsic value of all expressed perceptions is acknowledged, without falling into the trap of assuming that what is perceived is always and necessarily “true.” They will ground the interpretive, analytic conclusions they generate within both individual and collective representations of data, demonstrating the manner in which individual instances have contributed to a general pattern within the process.

While there will be a number of common elements to interpretive description designs, we would also anticipate a wide range of “flavors.” For example, one researcher using interpretive description to study women involved with breast cancer advocacy groups might position the rationale for that study as being “informed” by the emphasis of hermeneutics on the intersection between public and private process. Another studying marginalized immigrant families within a particular community context might explicitly draw upon ethnographic techniques to guide the steps and substance of data collection within the community. A third studying live birth following stillbirth might take advantage of some of the analytic procedures for thematic analysis within grounded theory methodology in order to explore the presence of common social processes occurring across individual accounts. Thus, interpretive description exists as a methodological framework within which a fairly wide range of options for design decisions—including pieces that may not have easily fit together within their original methodological tradition—can be enacted in a coherent and fully justifiable manner.

### ***Mapping Out the Plan***

As all researchers know, there are two distinct processes in working out design—what you claim you will do and what actually happens when the time comes. Ideally, these two processes are similar in most important regards; however, in the enactment of any study, and perhaps specifically an applied qualitative study, there are many decision points along the way that will shape the way in which “best-laid plans” actually materialize in the real-life setting. In this chapter and the next, we’ll discuss planning and the decisions you will make with regard to such matters as data sources, sampling considerations, data collection methods, and credibility requirements. In subsequent chapters, a more in-depth discussion of how you will enact the complex processes of data collection and analysis will serve as a guide to considering some of the common pitfalls and challenges that even the most meticulous planner will often find once out in the “field.”

What will keep your interpretive description study on point and on track throughout this process of continuously refining and fine-tuning your direction is the “line of sight” you create between the research question you have posed (your purpose in entering into the study) and the intended applied practice world within which you know the knowledge you seek is needed. If you think of these two points as beacons on two mountaintops reminding you of where you started and where you are going, then you can strategically and safely allow yourself to shift your direction a bit, change your pace, meander along paths you had not known about, and follow promising new options you might encounter along the way. Rather than simply sticking closely to a fixed compass point (which is what a conventional methodological tradition tends to favor), you allow yourself the luxury of fully unleashing your creative and critically reflective mind at each step of the way without fear of losing sight of your ultimate direction and purpose.

### ***Writing a Study Proposal***

All scientific research begins with an explicit proposal. In the qualitative health context, this is typically a thesis/dissertation proposal (if you are a student) or a grant proposal (if you are an established researcher). What the proposal does is force you to name a problem of some relevance, think through the scaffolding of your study, make a strong case that it is worth doing, and outline a clear and explicit road map for how you will do it.

One of the best ways to conceptualize your proposal is by taking the opportunity to read the proposals of others. While the enormity of a qualitative project can make your first experience quite daunting, there is a tangible logic to it, and seeing how others have laid out theirs can provide you with some ideas about structure and overall direction. There are also a wealth of excellent resources available to guide you in the process of creating different proposals for different

purposes and audiences. Many basic research texts aimed at applied practice audiences include extensive general guidance on the proposal writing process. Among the classic resources that I have found helpful in this regard are O’Leary (2014), Patton (2002), and Wood and Ross-Kerr (2011). Other tried and true sources specifically targeting applied practice scholars focus on particular aspects such as preparing a budget (Carey & Swanson, 2003), grantsmanship (Connelly & Yoder, 2000; Knafl & Deatrck, 2005), or gaining a competitive edge through attention to such aspects as artful writing (Sandelowski, Davis, & Harris, 1989). Current resources for proposal writing are now ubiquitous online, with most universities offering their own versions and funding bodies making proposal preparation guides openly accessible. So rather than telling you how to write your proposal, recognizing the diversity of contexts and purposes within which applied researchers will be operating, this brief chapter will orient you to the nature of the decisions you’ll have to make about your study and invite you to consider some of the approaches and strategies that have been found useful by others doing research within the interpretive description framework.

### ***Obtaining Ethics Approval***

A preliminary requirement for qualitative studies that are using human subjects in most jurisdictions is ethics approval. While interpretive description studies rarely involve the potential for bodily harm or high-risk activity, it is a fundamental premise across scholarly communities that the information obtained from research “subjects” must be used in such a manner that respects their needs and interests (Øye, Sørensen, & Glasdam, 2016). Further, it is widely recognized that information about people, and about groups, when interpreted or disseminated inappropriately, can significantly violate people’s interests (Drolet et al., 2023; Shaw, 2023). As we have collectively learned from many unfortunate situations, the potential harm to which research exposes people cannot be fully ameliorated by the singular element of obtaining informed consent (Pascoe Leahy, 2022).

While many of the “standard” requirements of informed consent and ethical research procedure can seem awkward within the qualitative context (Sellman, 2016), scholars have found various ways to balance the “fluidity” of open-ended inquiry processes with the “rigidity” required by various ethics review boards (Aluwihare-Samaranayake, 2012; Franklin et al., 2012; van den Hoonard & van den Hoonard, 2013). Newer researchers who do not have access to seasoned mentors in this regard will do well to consult the literature as well as make inquiries to their local ethics boards. Although the general principles of ethical procedure are common across jurisdictions, there are typically highly particular and specific requirements in each university or health authority context you may encounter, and they tend not to be particularly negotiable. And of course, the

principles and promises upon which you gain ethics approval must be scrupulously maintained throughout your study.

### ***Selecting among Design Options***

The basic design options of a study reveal a lot about your:

- *philosophical underpinnings,*
- *assumptions about the relationship between ideas and experience,*
- *perceptions of what kind of knowledge you are seeking, and*
- *sense of the ultimate purpose of what you seek to learn by doing the study.*

Newer qualitative researchers sometimes enter a study with a vague sense that what they want to do is talk to certain people about a certain topic, but there is much more to consider when actually mapping out a research design. Here we'll introduce some of the key considerations in what kind of data sources you might rely upon, how you might decide which source representatives to engage with, what you might do with them once you find them, and what sense you will be able to make of it all. It can be confusing to think it all through, but having a clearly defensible plan, even if you have to make a few detours from it along the way, is fundamental to producing worthwhile results.

## **Deciding on Data Sources**

### ***Interviewing***

Because finding ways to bring subjectively derived knowledge into the armament of useful disciplinary knowledge is what draws most health care professionals into qualitative inquiry in the first place, it is not at all surprising that interviewing has become the primary source of data in so many fields of applied qualitative inquiry. Indeed, the predominance of subjective data obtained through individual interviews has attracted considerable critique, and the hazards of overreliance on this particular form of understanding have attracted debate within the literature (Nunkoosing, 2005; Sandelowski, 2002; Silverman, 1985). In the applied health professional fields, interviewing is as familiar as breathing, and the kinds of subjectively inquisitive minds who turn to qualitative health problems often feel very comfortable in engaging “informants,” thinking that their experience in clinical interviewing will have prepared them for the skillset required of the research interview. However, this can be an importantly erroneous assumption, and we'll discuss this later when reflecting on what happens in the process of data collection.

Interpretive description explicitly locates itself within a philosophical tradition that tells us—at least in matters involving human experience—the “more probable truths” (Cutcliffe & McKenna, 2002; Johnson, 1996; Kikuchi & Simmons, 1996; Sandelowski, 1996) are those that we have arrived at using multiple angles of vision. In this sense, the term “probable” is clearly an invitation to ongoing investigation toward some better endpoint, even as we accept the current one as imperfect. In understanding a human practice problem, we easily recognize why teasing out a single measurable variable in order to quantify a complex phenomenon cannot effectively represent that whole experience in context. However, in our enthusiasm to balance narrow quantified perspectives with wider qualitative inquiries, we sometimes forget that subjectivity also has clear limits. If we consider our relationship to the “grand stories” of our own lives, those narratives we build about how key events occurred, we all recognize that subjective knowledge is shaped and constructed according to many masters—including ego, ideology, and social meaning. For example, although we are both fully competent and aware participants within a difficult family decision-making process, it is inevitable that my sibling will recall the same event quite differently from the way I am convinced it happened. We know that about how we live in the world, and yet we sometimes forget it in the world of qualitative health research, where the recollections of individuals about their traumatic or profound experiences can become reified into a form of a truth that seems incontestable (Arndt & Tesar, 2019; Huttunen & Kakkori, 2020; Nunkoosing, 2005; Sandelowski, 1991).

To some extent, this overreliance on subjective material as our closest approximation of “truth” derives from the extent to which we have relied upon phenomenology, which essentially studies entities for which there is no other material or social truth than the subjective. If I want to understand what it feels like to hear shocking news or to try to climb my way out of depression, the only way in which I can come to “know” the essence of that experience is through the various mechanisms by which subjective experience, at its most basic, is rendered into a form that is accessible to my consciousness and reason. Poets, artists, storytellers, and phenomenologists all contribute to my capacity to have that experience vicariously and therefore to come to “know” it in a sense that is meaningful.

In contrast, despite its sincere commitment to tapping that form of knowledge, a great deal of qualitative inquiry is more about “empathizing” or “understanding” than it is about “knowing” in the existential sense, and this has created much of the departure from phenomenological tradition that we see today (Norlyk & Harder, 2010; van Manen, 2017). We seek patterns and themes within subjective human experience not so much as to grasp the “essence” of that experience as to understand what we are likely to encounter in future clinical practice and to have some meaningful sensitivity around it. The deepest individual

expressions that can be captured on film or in print will certainly become part of what informs us in our practice, but they may also paralyze us into inaction or mislead us as to which aspects of that experience are unique to individuals rather than commonly shared. Thus, although interpretive description owes a great deal to phenomenological methods, it reflects quite a different attitude toward knowledge and knowing.

That said, there is still good reason for capitalizing on individual interviews as a useful core for the development of knowledge in relation to many of the practice issues we encounter. If we want to understand what kinds of responses scleroderma patients encounter when they attempt to seek primary care with non-specialist clinicians, our best bet is likely to ask a few of those patients and to systematically organize and make sense of any common elements we find recurring in their accounts. We know that if we were to interview one or two, we might get a “feel” for the issue quite quickly; however, as clinicians in the field would know, we also might well have tapped into those one or two who represent the more complacent or frustrated end of the spectrum. Thus, although the clinical case report has its honored place in medical literature, qualitative researchers tend to rely much more heavily on accounts that involve multiple people under multiple and various circumstances. We’ll say more later about how to decide how many is sufficient.

#### **BOX 4.1 INTERPRETING THE IMPACT OF ILLNESS**

Because non-communicable disease represents an increasing challenge for health care systems worldwide, these researchers wanted to understand how patients in Greenland experienced being diagnosed and living with pulmonary disease or diabetes. They learned that either condition required a rapid change in everyday life and the lifestyle behaviors of these persons, and that this adaptation was a major struggle for many in that it altered their important interactions with their natural and social environment. Further, the researchers learned that Greenland’s cultural attributes such as self-reliance and the reduction in community participation that accompanied ill health meant that some patients experienced shame and were inclined to suffer in silence. On the basis of these understandings, the researchers called for a reorganization of clinical services toward an increased focus on lifestyle support.

Nielsen, M. H., Jensen, A. L., Pedersen, M. L., & Seibæk, L. (2024). Living with chronic obstructive pulmonary disease or type 2 diabetes in Greenland: A qualitative interpretive description study. *International Journal of Circumpolar Health*, 83(1), 2296706. <https://doi.org/10.1080/22423982.2023.2296706>

### ***Participant Observation***

Next to interviewing, participant observation has been the most common source of data for qualitative health researchers. Again, its appeal is perhaps that it feels quite familiar. As practice-based professionals, we are comfortable being on the inside, and assume that “hanging out” in a purposeful manner can surface patterns and themes within what we observe.

Participant observation was designed as a technique to get at people’s thinking through understanding patterns in how they behaved. It is the primary tool of the ethnographers who are trying to make sense of the tacit understandings underlying the actions and behaviors of people from cultures with rule sets different from their own. By watching in a careful and meticulous way and systematically documenting what it is that we see, we can begin to appreciate the social structures underlying what seems on the surface to be a curious action. A significant advantage of participant observation is that it allows the researcher to operate from a standpoint that is not overly influenced by subjectivity—why people think they are doing things in the way that they are. While traditional ethnography typically combined participant observation with key informant interviews, the intellectual “distance” that the anthropologist was encouraged to take from the ways of the culture was what permitted the possibility of useful theorizing (Brink, 2013). Indeed, being too close to the logic of the social groups that were being observed put the researcher at risk for suspicion of excessive immersion (the phenomenon formerly widely known as “going native”) and the research products being discounted (Dumont, 2023).

In the applied health research context, participant observation raises a number of important problems that must be taken into consideration. First, the clinical researcher has the problem of already having been socialized into “seeing” the field with a particular professional lens. The power of that lens, and its capacity to radically alter what you see and what sense you make of it, has been vividly captured in various accounts of seasoned clinicians who subsequently become patients (for example, Sacks, 1984). This is not to say that clinicians are inherently insensitive to what the world looks like from the perspective of those who receive their care, but that the experience from the “other side” can be profoundly myth-shattering when it moves beyond the virtual and into the real. What this tells us is that it is not at all unproblematic to do participant observation in a world in which you already have familiarity and undoubtedly well-formed opinions, even if they lurk somewhere below the surface of what you can comfortably bring to consciousness. Thus, the task of the participant observer is to rigorously and systematically ensure that the lens through which you are looking is open, transparent, and clear; the quality of your research product will depend entirely on how convincingly you can show that you accomplished that. What that will mean is not simply claiming suspension of prior belief but continuously

challenging yourself to consider what else you might be missing and what alternative interpretations might pertain to what you are seeing. And, because the human mind does tend toward creating pattern and interpretation on autopilot, and convince itself of the legitimacy of its conclusions, you will have to accept the possibility that what you conclude may expose you to significant critique if your conclusions do not happen to match the perspectives of others.

### ***Focus Groups***

The idea of bringing groups of people together and triggering a group engagement within a topic that then becomes a source of data derives from two distinct traditions, and it is important to understand something of that. One species of focus group arose from academic activity to promote revolutionary social change in South America (Fals-Borda & Rahman, 1991; Friere, 1970) and became a participatory mechanism whereby the academic community could work in tandem with local groups to create a social movement and produce massive economic reform. This kind of focus group was designed specifically to galvanize communities into action because of the power that their shared knowledge could offer them once they had brought it to consciousness and recognized its potential. A very different kind of focus group derived from North American marketing research, in which it was to the benefit of corporations to create a mechanism by which to understand public opinion. The idea here was that, rather than sampling individual opinions, which notoriously change under social pressure, one would gather a group of individuals, expose them to a particular idea, and see what kind of consensus evolved within that social dynamic. In this way, focus groups were very much about using research to uncover or create a shared perspective, rather than to pay excessive attention to the meaning of individual differences. This profound recognition of the effect of the group—considered a microcosm of society—is a hallmark of focus group methodology (Stewart & Shamdasani, 2015).

While bringing people with similar experiences together to exchange ideas is unquestionably a powerful tool for public opinion or social consciousness building, it is important to remember that not all health problems worthy of study inherently derive from an assumption of the dominance of social forces. Certainly, when the health research has to do with mobilizing powerless consumer groups or energizing leaders of disadvantaged demographic subsets in an “action research” project, the focus group might well be the data collection strategy of choice. However, if the point of the research is to understand commonalities and diversities among people who have, for example, sought treatment for a particular disease condition, then the focus group might be fundamentally wrong for your purpose.

Sadly, it would seem that qualitative health researchers sometimes look toward focus group designs as a seemingly efficient way to augment their participant

numbers in what is basically a conventional interview design. However, since the group dynamic is the foundation of the focus group process, inappropriate use of this technique can systematically obscure important perspectives and lead to dangerously wrong results. Among patients who have had a particular illness, for example, those who are the most ill or angry will inevitably be given the most airtime within a group discussion, while those who feel more privileged or lucky may be more easily silenced. Loud voices can obscure the voices of those who are less confident. Because focus groups are not the best context for individuals to freely “tell their own story” in any meaningful manner, they deprive the researcher of the more in-depth experiential variation that makes individual interviews so compelling. And because such groups capitalize on the social dynamic, they tend to wash out elements of the common experience that are not easily articulated or justified. By understanding what focus groups do and why you might use them, you can make thoughtful choices as to whether they will or will not serve the unique needs of your particular study.

### *Documentary and Collateral Data Sources*

An often neglected data source is textual material that might expose you to subjective knowledge or to discourses that might yield new insights about underlying beliefs, opinions, and attitudes about a phenomenon. Increasingly, qualitative health researchers are discovering that there is much to be gained from using inductive analytic techniques to study available data sets that have been generated through different means than simply interviewing or observation. Documents, including such materials as policy documents, records of institutional planning meetings, lay autobiographical accounts, or publicly shared social media postings, may tell us a lot about certain experiential phenomena if carefully and thoughtfully analyzed (Morgan, 2022; Rapley & Rees, 2018). An advantage is that they can minimize the extent to which researchers have shaped their construction (which is an important consideration for the other data sources I have just mentioned), and they can offer us a range of subjective and objective knowledge (Grant, 2018). Because you need to know what went into the making of a document in order to understand the uses to which it ought to be put, all documentary sources will be seen to have their limits (lay autobiographies tend to be written by people whose experiences were on the extreme end, policy documents tend to have been written in a manner that is unlikely to embarrass or upset health authorities or governments, and so on). But documents as a primary or collateral source of data are often worthy of consideration.

One particular documentary source that has attracted considerable attention in the qualitative health research world is preexisting data sets derived from one’s own qualitative projects or those of others (Hammersley, 2010; Heaton, 2004; Hinds, Vogel, & Clarke-Steffen, 1997; Long-Sutehall, Sque, & Addington-Hall,

2011; Thorne, 1994, 2013b). Because data collection using interviews or observations requires a relatively exhaustive effort, many researchers are eager to capitalize on getting full value from the data sets that have already been collected. Those persons who gave of their time to “tell their story” tend to be delighted to know that more people have actually listened, and most researchers are painfully aware that their reports from the primary analysis can only have captured part of the entire context of the multi-faceted material they were studying. Secondary analysis can also bring together data sets generated by different researchers on a similar topic, thereby providing a way to reconcile some of the limitations that can come from reliance on the individual researchers and their regional contexts. However, while secondary analysis can seem appealing in that it allows one to sidestep the time-consuming process of full immersion in fieldwork, it requires a very serious and thoughtful treatment of the nature and limitations of the existing data sets and therefore should not be taken lightly as a way of doing easy “armchair” research.

Over recent decades, we have seen an increase in enthusiasm for visual and sound data collection through the magic of technological advancement. Early attempts included the use of videotaped data to reduce the problematic influence that a participant observer might have had on the behaviors being observed (Bottorff, 1994). Using art or photographic images as an adjunct to interviewing can create a window into what the other “sees” and a prompt to more in-depth reflection within the interview format (Butler-Kisber & Poldma, 2010; Cannuscio et al., 2012; Catalani & Minkler, 2010). Further, they can be strategically applied in an assistive capacity to conduct research with special populations such as the deaf community (Anderson et al., 2018). The global COVID-19 pandemic radically disrupted customary patterns of data gathering, prompting many researchers to pivot their designs and discover the advantages of virtual approaches, including a recording capacity that is more difficult in in-person interaction and the ability to push past the usual constraints of geographical location (Keen, Lomeli-Rodriguez, & Joffe, 2022). They also increasingly recognized the advantages of video-recorded material for allowing access to private spaces, documenting behavior in its natural context, exploring naturally occurring data (Kiyimba, Lester, & O’Reill, 2019), and supporting the kind of frame-by-frame analysis that lets you see much that can be missed at normal speed and in the complexity of the moment (Nassauer & Legewie, 2021). And while such strategies are not quite providing direct access to subjective experience, they can help gain proximity to it when augmented by other techniques, such as building analysis and interpretation of what is captured electronically or on film into subsequent research interview encounters.

Although each of these sources can and will be used in a primary sense, there is also considerable value in tapping their potential as a form of collateral data for a study whose primary data derives from other sources. In this way, they can help counterbalance the known limitations of the data source and provide at least one additional angle of vision to correct any refractive error that may

result from the design decisions (Jentoft & Olsen, 2019). Using alternative data sources as a collateral approach does not, in my opinion, require that you build separate methodological arguments for how you will analyze each form of data separately but does require some thoughtfulness in advance about the way in which perspectives from one angle will be used to inform the other to create a more transparent audit trail for the eventual analysis.

Finally, a note about the “thoughtful practitioner,” which I see as a potential “collateral” data source that is quite often neglected in qualitative health and other applied research designs. In studies in which the focus is explicitly to challenge what are understood to be deeply held biases within professional practice, one would not likely turn to practitioners for inspiration. However, most qualitative studies are more about systematically harvesting shared and patterned experiential knowledge so that it can be of use in sensitizing or informing the people who are engaging in practice. In such instances, there is, in my opinion, a tremendous collateral role for the expert practitioner, whose perspective will have been formulated on the basis of having seen many “cases” over time and who may well be able to spot potential variations and diversities that are beyond the reach of most qualitative studies. For example, if you interview ten people about a phenomenon, it can seem quite convincing if they all see it in much the same way. However, testing that observation against a thoughtful, experienced practitioner—selected in a highly purposive manner specifically for that capacity to consider practice phenomena across time and context—you may learn that this dominant view is linked with a particular practice setting, demographic group, or practice philosophy. The “thoughtful practitioner test,” built into the design of your qualitative study, may help you avoid some of the analytic errors that the limits of your design pose and increase your likelihood of producing findings that have impact beyond sitting on a shelf. Because you will use the thoughtful practitioner perspective with as much critical reflection as you would any other form of data, something doesn’t have to be true just because those in the field think it is, but triangulating what the best practitioners have observed over time in relation to cases that are beyond your direct observation with what you can see and hear from those who are telling you directly about their own experiences can make for a fairly powerful set of findings.

As an aside, I have long been fascinated by how polarized the qualitative health research community has been in privileging “patient perspectives” over those of professionals as if professionals were, inherently, problematically biased. While those who have personal subjective experience of a phenomenon can add greatly to our understanding, I also think that the subset of informed, thoughtful, expert practitioners can become a wonderful resource for capturing the hard-earned insights that each will have achieved and which may not have been shared collectively or documented in the literature. My own experience, several years ago, tapping the expert knowledge of pediatric clinical nurse specialists with particular

expertise in children requiring gastrostomy (direct feeding through a surgical opening to the stomach), convinced me that the experiential knowledge that these practitioners offered was a marvelous and rich source of insight about clinical patterns and themes that would not have been accessible through other available data sources. The findings from that study ultimately did far more to produce knowledge that could sensitize those in the practice world to the traumatizing subjective experience of the mothers of these children than could patient or caregiver data alone (Thorne, Radford, & McCormick, 1997). From that experience, I learned that including a mechanism for locating and tapping the wisdom of those whose professional commitment embeds them in the field every day is often a valuable study design feature highly consistent with the ideals of interpretive description.

### *Using Multiple Data Sources*

As has become apparent in the description of each of these possible data sources, none are inherently preferable to others across all of the various issues you may wish to be studying. Each has its strengths and limitations, and the goal in framing your study is to optimally match what it is you want to find out with the data sources that are most likely to produce meaningful answers. Researchers who are able to work with multiple data sources in the course of a single study may reduce the likelihood of falling into the inevitable epistemological traps that each of these data sources sets in your way. And while you may add some new complexities to your project, some of which we will speak to in later chapters on the design, you may find that you can feel more confident in conclusions that are confirmed through the multiple lenses of different actors or observers of the phenomenon you are studying.

Thus, while multiple data source studies do offer the promise of richer and more complex data sets upon which to generate new findings, the studies derived from them are not necessarily better or more relevant to your research objectives, and what is possible and feasible will have to be determined in relation to your own context and circumstances. If your study is aimed at a smaller and more exploratory kind of investigation, or your time and available resources put constraints on what you can aspire to, single data sources may well be sufficient. The key to success, however, is developing a thorough understanding of what your data source implies and ensuring that you keep the limits associated with that data source front and center in your awareness when it comes time to analyzing and (especially) drawing conclusions about your findings.

# 5

## STRATEGIZING A CREDITABLE STUDY

Following upon the logic of the philosophical underpinnings under which you are operating and having worked out some basic elements of design, you are ready to expand on the “bare bones” of your proposed interpretive description study with some more concrete and explicit decisions relating to such matters as sampling, general data collection and analysis options, and the manner in which you will build into your design those elements that will ensure the credibility of your final product. If you are a newer researcher, you’ll find that these decisions can be quite challenging, since each has significant implications, few of which will be fully apparent to you until you have run up against them in the field. However, we all had to learn once, and if you do have access to mentors and guides who have gone through all of the steps of a study before, you can minimize the overwhelming feeling of panic that is fairly common in these early conceptual stages.

In some academic disciplines and branches of science, the research proposal will be a relatively straightforward part of the project, because there are clearly established methods that you are expected to follow. With interpretive description, as with most qualitatively oriented projects, it is quite the opposite, and a lot of hard conceptual and intellectual work goes into the early planning stages. However, you can comfort yourself with the knowledge that all of this planning work directly informs the actual doing of the research and that it is inevitably time well spent. My doctoral dissertation students, for example, often find that close to half of their dissertation report will have been written before data collection even begins. So, this planning aspect is not a stage to rush through, and the understandings you establish at this stage about both yourself and your proposed research approach will greatly facilitate a smooth and successful process once you are actually out in the field.

## Sampling

Having ascertained the source(s) that will be best suited to the kind of study you are planning and the kinds of findings you are hoping to be able to generate, you will next need to consider what subset of the theoretical whole “population” you intend to engage with and how you will locate and involve that “sample.” In most instances, it would be impossible to have access to the full complement of people who have encountered a particular phenomenon, and so you’ll need to be thinking about what angle of that phenomenon or what representation of that perspective you’ll be looking for. Matters of understanding representation, working out sample size, and deciding on sampling procedures are an inherent part of all research plans.

## *Representation*

The notion of representation as a component of research validity—or what our research findings actually mean in the larger scheme of things—is a tricky and complex one. The concept in the more usual sense derives from the quantitative requirement to produce a mathematical assessment of the probability that the data sources and points of data collection you have used reflect a commonly accepted measure of the whole. Because that form of science is driven by the basic assumption that a “truth” is there to be found, the rule structures around how you make claims in this regard have become quite explicit.

In the social science world, representation becomes more akin to the messy and complex business of how we sort out whose voices have been listened to in making societal or political choices and who gets to determine what those voices have intended (Lokot, 2021). By virtue of our association with a social science heritage, applied qualitative researchers may find it helpful to place “the problem of representation” that is much discussed in the literature into additional context. Critique of the “researcher as instrument” aspect of qualitative social science inquiry has led to troublesome questions about what qualitative products actually represent, in particular, the extent to which they may be more reflective of the theoretical aspirations of the researcher than the actual experience of those being researched (Mantzoukas, 2004). This concern derives in part from the significant difference between the kinds of discourses that actually take place in the field and the ideals of what constitutes a theoretically sound and highly scholarly social science “text” (Crang, 2005). This “crisis of representation” implies a sufficiently serious disjuncture between process and product to have raised doubts about the legitimacy of qualitative work in general and to anxiety about praxis in the sense of any action that might be taken on the basis of such findings (Lenger, 2019; Onwuegbuzie & Leech, 2007).

Because the products of research in the applied practice fields tend to reflect quite a different “look and feel” from those of social science, involving

description and interpretation that typically comes closer to what those being studied can recognize and understand about themselves rather than the more formal products we would associate with high theorizing, our kinds of inquiries are arguably at much less risk for this kind of departure. However, it is always important to remember that a researcher can “get it wrong,” and therefore, there are many lessons that applied researchers can draw from these social science crises. We know all about interest groups, silent majorities, and the ubiquitous influence of power, but we still cannot really determine how to make public choices in a manner that is completely true to the philosophical values underlying a concept like “democracy.” Similarly, in our qualitative inquiries, it will be safest to assume that every voice we encounter in trying to expand knowledge about a human experience will have an explicit interest or bias to bring to our attention. Further, we also have to assume that none of them will have full access to the whole of all possible interests. Thus, we need to find ways of thinking about the sample subsets we create for the purpose of answering a research question, come up with reasoned arguments about why they are worth attending to, and estimate what angle of opinion or perspective each subset may be privileging or silencing. Clearly, there will be more to say in later chapters about how we enact our inequitably powerful position in shaping the manner in which those opinions and perspectives come to light (in other words, what it is that we will do with them once we get them), but here we are primarily concerned with the matter of who among the total theoretical population will be invited into our study and how we will determine the implications of that representational decision.

Obviously, accurate population representation in the qualitative sense is not achievable by the mere fact of numbers, since there is no common basis upon which we could agree what the appropriate denominator ought to be. Researchers would do well to recall Popper’s challenge to “naïve induction,” expressed as questioning how many thousands of white swans you would have to see before you could safely conclude that no black ones exist (Popper, 1972). Similarly, we can’t achieve it by virtue of social hierarchy, since those who claim to speak for the masses (such as leaders of patient advocacy groups) are in positions that inherently distinguish them from the masses they purport to represent. Not that they won’t have an important story to tell, but it is quite likely to differ from the story that would be told by most of the individuals whose interests they are advancing.

I think we do much better if we understand that representation serves us best as one of those broad social ideals (like dignity or integrity) that is worth keeping in mind but is not a thing one can actually achieve. This stance forces us to assume that whatever sample we come up with will not in any meaningful way “be representative,” but rather will reflect a certain kind of representational perspective built from an auditable set of angles of vision whose nature and boundaries we can explicitly acknowledge and address. The way we use our critically reflective capacities to come to understand the nature of our samples,

the limitations that are inherent in any sampling procedure, and the implications these have for how we think about the findings we eventually generate on the basis of those samples is what will shape the integrity and credibility of our final product. Thus, there is no fundamentally right way to sample to ensure that our sample represents something worth studying, but rather an essential requirement that we conduct our study on the basis of some thoughtful and transparent sampling logic and then report on our findings in keeping with what we understand our sample to reflect.

### ***Sampling Approaches***

#### *Convenience Sampling*

Most applied qualitative research relies upon some variation on the theme of “purposive” or “theoretical” sampling to identify which people or situations will become the central focus of the study (Kuzel, 1999; Morse, 1989b; Sandelowski, 1995b; Whitehead & Whitehead, 2020). In some instances, a sample created entirely by “convenience” is quite appropriate, in that the group of people who are closest at hand may well be an excellent source of insight for applied qualitative researchers about a phenomenon, particularly in the earliest stages of describing aspects of its shared experience. However, most such groups will reflect commonalities whose features might well skew the researcher’s perceptions about the phenomenon and limit their credibility in venturing into any interpretation beyond the specific study context. For example, if a study recruits all patients in a particular hospital unit with a particular condition over a one-week period, then the researcher will be obliged to carefully reflect on how those patients might have been similar to or different from the annual patterns within that hospital or in other hospitals in other settings. In this instance, careful attention must be paid to any peculiarities of this context that might render this group of people quite different from the more general population of such patients. If the unit has a particularly charismatic staff complement, a specialized research program, or even exceptional patient “hospitality” services, one can quickly see how shared and common experiences might tell us far more about the experience of the health care setting than about the experience of the clinical population. So, while it isn’t wrong to study convenient samples, the basis upon which those samples are presumed to tell us anything beyond the local context will have to be argued through other means. A researcher might, for example, capitalize on a broader literature to depict this particular setting within the larger context and, in interpreting findings, explicitly critique the possibilities that this sample varies significantly from others. As a general rule, however, while convenient samples can create a strong basis for “description,” they tend to create proportionately greater challenges to justifying “interpretation.”

*Purposive Sampling*

A somewhat more representative sampling technique is “purposive” or “phenomenal” sampling, in which the settings and specific individuals within them are recruited by virtue of some angle of the experience that they might help us better understand (Jones, Torres, & Armino, 2022). It is difficult to discuss this technique without using the term “representation,” but avoiding that language, if at all possible in framing our research intent, can be helpful in keeping us honest. For example, using purposive sampling, we might recognize that if we only included female participants in our study sample for a particular condition that affects both men and women, we are at risk for misunderstanding some important aspects of the experiential accounts that are specific to gender. Often, these most probable variables that are likely to shape health and illness experience can be predicted in advance, and we can generate a list of those about which we’d like to ensure sufficient diversity within our ultimate samples. The literature can be a particular source of guidance in this matter, since where there is a body of literature that claims differentiation on the basis of one feature or another, we can be certain our critics will challenge us on that basis when we try to present our findings. So, the strategy of purposive sampling is to try to identify, in advance of the study, the main groupings or conditions that you will want to have ensured you include in your study in some fair measure so that the eventual findings you produce have the potential of ringing true or seeming reasonable to your intended audience (Robinson, 2014).

A particular and important form of purposive sampling is the strategic identification of “key informants,” which has long been the hallmark of ethnographic studies (Pahwa, Cavanagh, & Vanstone, 2023; Pelto, 2013). The rationale for key informants is that some members of a community will be better equipped than others to provide you with access to what is happening and why it is happening. In the tribal context of early anthropological studies, for example, one might specifically seek out a chief or someone whose societal role afforded a relatively informed perspective on the society as a whole. Another feature of the key informant was willingness to engage in informing the researcher, and, therefore, building strong interpersonal relationships with key informants was a central component of the process of “entering the field.” In the health research context, however, one is a little less likely to be able to identify community members with sufficient stature or position to speak for a group in quite the same manner. However, the underlying idea of the key informant might cause you to seek out individuals with extended experiential backgrounds and/or who would have had extended exposure to other people with backgrounds similar to their own. Unlike the phenomenological context, in which your ideal co-researchers would be willing to share “pure” experience without the benefit of contaminating it with theorizing, the ideal informants for an interpretive description study might

well be those “everyday philosophers” (Gubrium, 1988) within the population who had a particular affinity for observing and critically reflecting on the situations within which they found themselves rather than simply living them.

### *Theoretical Sampling*

A third main form of sampling that plays a prominent role in interpretive description is theoretical sampling. This term derives from grounded theory methodology (Glaser & Strauss, 1967; Strauss & Corbin, 1998), where it explicitly builds the sampling strategy from the evolving theoretical variations that derive from the data as the study is being conducted. An important element of theoretical sampling is the idea of maximal variation, in that, as hunches about patterns and themes begin to emerge from the initial phases of data collection and analysis, you will need to search out specific types of “cases” in order to know whether what you are seeing so far is anomalous or an artifact of some unexplained characteristics of your current sample or study design. So, for example, if all of your initial study participants report a similar level of emotional discomfort as central to their experience with a particular diagnostic procedure you are studying, you will want to be sure you explicitly search out contrary cases of individuals for whom there was little or no emotional impact. In this way, you refine the list of phenomenal or demographic variables upon which you are trying to find maximal variation by adding in variables that would not have been apparent before you entered the study. Later in the study, the idea of theoretical sampling takes on a more explicit purpose in fleshing out the groupings or categories of phenomena that you are considering reporting as findings. If you believe, for example, that you have observed three distinct styles of emotional coping as approaches to dealing with the noxious diagnostic procedure, you might use theoretical sampling for further cases within each of the styles to help refine your claims about what differentiates one from another and what variations occur within them. Further, before drawing premature conclusions that these three styles represented the field, you might, in consultation with your thoughtful clinical practice experts, try to uncover cases that did not appear to fit any of these patterns.

Because your intent is uncovering knowledge that may be relevant for applied practice and not formal theorizing, interpretive description studies do not require the full scale of analytic depth that theoretical sampling contributes in a grounded theory study (or, more specifically, in any study that claims to be generating formal theorizing, as applied studies claiming grounded theory methodology may stop at description). Nevertheless, the principle of reserving some of these sample selection criteria until the data collection is underway, generating them from and in support of the evolving data analysis and interpretation, and explicitly seeking maximal variation on relevant phenomena that

seem central to the focus of the study are all well worth building into a design. While theoretical sampling necessarily requires that you reserve some decisions as inherently emergent within the design, and not all ethics review or granting bodies will be entirely comfortable with the idea of a design in which all elements cannot be ascertained in advance, a thoughtful consideration of the principles and the manner in which you would intend to apply them can be elegantly and convincingly argued in a well-constructed interpretive description design.

Beyond these three common sampling strategies, those interested in developing more comprehensive and fulsome studies may well find it helpful to explore the wider range of available alternatives. Among the more elaborate approaches you may want to build into your study, especially when you are moving beyond initial exploration and into the development of more refined and coherent interpretive descriptions of phenomena, are stratified sampling, cell sampling, and quota sampling (Campbell et al., 2020; Robinson, 2014). Thoughtful consideration of which approach makes the best sense to the nature of your topic, population, and capacity will ultimately help enhance the claims you make about the manner in which your findings represent your field of interest.

### *Finding Terminology to Refer to Sample Members*

Another aspect to remember here is that the terminology by which you refer to the people who end up in your study does reveal something about the philosophical position that you are taking in your research and the claims you are making about their role within the research process (Karnieli-Miller, Strier, & Pessach, 2009). The term “informant” has a long history within ethnographic circles and reflects those individuals within a culture or society identified as being particularly familiar with the relevant elements of the culture and who were willing to spend the time to explain them to you. Needless to say, the quality of a study is quite dependent upon the key informant selection, since, if you emphasized the perspective of a community member with an axe to grind, you could jeopardize the integrity of your entire interpretive description project. Further, because many communities are made up of distinct “factions,” and your key informant choices could be well known, you might well find that certain perspectives within the community could become lost to you while others are privileged. So, the idea of tapping “experiential experts” was a central one, but not without its challenges. In the current context, many qualitative health researchers avoid the use of the term “informant” because they believe it distances them from the phenomenon of interest, and perhaps also because it may seem to have a somewhat sinister connotation within the public context. They similarly avoid the term “subject” because it seems to objectify and compartmentalize the human beings with whom they are hoping to have a more full and engaged interaction. However, where you are simply observing and not actively engaging with people,

such as in some grounded theory studies, the term “subject” may still have some value.

Within some qualitative research traditions, the term “co-researcher” has emerged as one alternative terminological possibility. This term implies, however, that there is something of an equal partnership between the researcher and the individual being studied, with comparable motivations for the nature and quality of the research product. In a phenomenological study in which a researcher and an individual commit to an extensive engagement of sequenced conversations to systematically uncover layers of meaning inherent in a particular subjectivity that is of concern to them both, the term “coresearcher” may well be an accurate expression. Similarly, in participatory action research in which the researcher has been engaged by a group in its effort to surface its embedded knowledge as a source of power to mobilize change, the term would reflect that distinctive balance of roles. However, in much of what we currently read within the qualitative health research domain, the use of the term “coresearcher” seems to reflect a “feel good” self-congratulatory statement rather than any meaningful procedural commitment. Worse, it seems to absolve the scholar of full responsibility for the research product, despite the probability that the subject of the scholar’s attention is not always awarded co-authorship status or substantive credit in the final analysis. In my view (explained further in Chapter 17), it is a term best reserved for those occasions when there is a genuine and ongoing partnership between the knower and the known that shapes all elements of the design, implementation, and ownership of the project, including a willingness to abandon the project should the co-researcher choose to resign from it or object to its continuation.

In this context, then, we are left with few good terminological options available for describing the subject of interpretive description research. Variations such as “respondent,” “interviewee,” and “collaborator” all suggest degrees of hierarchical or egalitarian relations that may further confuse your intentions. Because of this, the generic term “study participant,” alternating with specific categorical terms relevant to your intended study population (such as “street-affected youth,” “personal care worker” or “child with asthma”), has become somewhat standard in that they are relatively neutral in their implications and do not carry the implicit unintended baggage from other qualitative research traditions.

### *Projecting Sample Size*

Interpretive description can be conducted on samples of almost any size. As Patton points out, “Qualitative inquiry seems to work best for people with a high tolerance for ambiguity” (Patton, 2002, p. 242), and the matter of sample size is a case in point. Although the vast majority of studies within this approach are likely to be relatively small (including, perhaps, between five and thirty

participants), the principles can be applied for various reasons to studies whose sample sizes are much smaller (such as single-case studies) or larger (Trotter, 2012). In my own research, I have used sample sizes as large as 250 individual interviews in recognition of the complexity of the issues of concern and my understanding of the values and beliefs characteristic of the particular audiences to which I planned to direct my findings.

The best way to justify a sample size is to generate a rationale that is consistent with the research question (Cleary, Horsfall, & Hayter, 2014). How many instances of a thing would we need to include in our observations and analysis in order for the findings to have any merit to those for whom we are conducting the research? If the background literature and disciplinary wisdom suggests that a certain phenomenon occurs commonly within clinical populations and what is needed is a more in-depth exploration of its underlying subjective experiential nature, then we can likely determine that engaging with a small number of individuals experientially familiar with it and willing to share that with us can produce something worth documenting. For example, a nurse researcher seeking to better understand what late-stage cancer patients experience during episodes of shortness of breath so that such individuals can be better supported within the palliative care context may find that the most appropriate study would involve a small available group of individuals carefully selected with clinical staff by virtue of having episodes of that experience, not being in sufficient distress to preclude the appropriateness of interviewing, and having an interest in spending time with the researcher to explain that experience. Elements of recruiting, sample selection, and data collection strategy in this kind of study might be strongly shaped not by formal methodological requirements but by the most clinically appropriate way to gain access to knowledge about what it feels like to become breathless toward the later stages of a cancer trajectory. In using this somewhat extreme example of a clinical study, I illustrate that interpretive description has become a frame for following a disciplinary logic as to

- *what knowledge we need,*
- *what options there are for getting as close to it as we reasonably can, and*
- *how we can enact that inquiry in a manner that is most respectful and consistent with both ethical research guidelines and the foundations of ethical practice.*

In the above example, it would be relatively easy to understand why a small sample, handled carefully, might produce the knowledge we are seeking. However, there will be many other kinds of clinical studies in which an overly small sample is likely to do an injustice to the topic and lead us into the kind of illogic that “naïve induction” implies (Sandelowski, 1995b). Unfortunately, in trying to be helpful to researchers and give them a published basis for defending small studies, certain authors, such as Morse (1989b), who estimated that six might

### **BOX 5.1 WHAT CONSTITUTES INFORMED CONSENT?**

A scholar in the field of veterinary socio-legal studies in the United Kingdom was intrigued by the ethical and practical complexities of an informed consent that is inherently provided by an animal owner rather than a patient who can consent on their own behalf. Combining interpretation of legal decisions and professional ethical guidance with thematic surveys, this interpretive description study triangulated insights derived from empirical data analysis and doctrinal legal research to build a conceptual understanding of this distinctive form of consent with sufficient depth to enable the production of normative guidance for practitioners in the veterinary field. This included the need for a detailed record of the consent, the expectation that client autonomy be balanced with patient best interests, and the necessity for all three parties to have legal protection.

Gray, C. A. (2020). Researching consent in veterinary practice: The use of interpretive description as a multidisciplinary methodology. *Methodological Innovations*, 13(3), 1–11. <https://doi.org/10.1177/2059799120961614>

be a reasonable sample in a phenomenological study, or Kuzel (1999), who suggested that five to eight participants might be sufficient for a homogenous group, have inadvertently found themselves cited as justification for the inherent value of small samples. In some instances, these citations reflect a hollow defense for sample sizes that would ultimately minimize a study's chance of attaining sufficient depth to allow for reporting beyond "thin" description or making any meaningful contribution to the field. While small studies are the way in which most of us learn qualitative technique, and many smaller studies have in fact generated highly respected original findings, the trend toward a rapid proliferation of very small studies has not served the overall field of qualitative health research to best advantage and may in fact have compromised the acceptance of qualitative findings outside of the methodological community.

#### **Setting Limits**

Because there is no firm and fast rule regarding what constitutes the right sample size for an interpretive description study, it is incumbent upon the researcher to generate a coherent and defensible claim about the proposed number of cases, subjects, or instances that would have to be included in the study in order for its results to be worthwhile. In my experience, a proposal can most effectively communicate the researcher's intention by providing both an anticipated range and an explanation for why the upper and lower limits have been selected. Typically, the lower number might be that of the fewest instances that you'd consider you need

to understand in order to be able to discern what constituted common aspects across them. I often share with my students an early lesson I had in this regard during my initial foray into qualitative research when six of the eight families I interviewed had surnames starting with the same letter of the alphabet. While initials are unlikely to be an overly meaningful variable in the lives of families experiencing cancer, had the sample revealed such an extraordinarily dominant variable relating to family dynamics, for example, I might easily have misread its relevance with the analysis and over-inscribed it with some powerful interpretive meaning. This early lesson taught me never to assume that what seems most evident across cases in smaller studies is necessarily the relevant finding.

It is not uncommon or inappropriate for time and resources to become a reasonable element in the decision to constrain sampling within a smaller interpretive description study. Few of us within the health field have unlimited access to both, and we know that grant funding and ethics approval processes require that we set arbitrary boundaries on a discrete project. Nevertheless, if these become the primary rationale for setting the study limits, the logic of qualitative science is dis-served. My recommendation would be to take these into consideration in the selection of study scope and intent and to ensure, if the study is to be smaller, that you have articulated the kind of problem that can reasonably be tackled with the anticipated exposure. To believe that you can generate a coherent, well-integrated new theory about a practice or clinical phenomenon on the basis of having briefly interviewed a half dozen conveniently recruited informants is to completely misunderstand how one constructs and evaluates useful qualitatively derived knowledge. However, offering a meaningful clinical description, framed in such a manner that it poses and begins to reflect upon the kinds of questions and concerns that a disciplinary lens can bring to bear on the understanding of a complex problem, may be an entirely worthy objective for a smaller study.

Because there is no truly meaningful objective justification for the specific number of people, cases, or instances that are required in order to conduct a good qualitative study (Sim et al., 2018), you do need to consider how you can justify an appropriate stopping point. Some researchers estimate an upper limit on the cases they will include in their studies and reasonably conclude that, when they enter the field, they can adjust their scope according to the nature of the study within those limits. Certainly, if some of the people that you interview turn out to be poor informants, or your exposure to them is much less intensive or in-depth than you might have wished, you are likely to want to expand your numbers. Or, if the sample you have acquired has given you a glimpse into a theoretical variable that may be quite relevant but hasn't featured in your sample thus far, you may need to expand your data collection in order to generate an interpretive analysis that is built upon data rather than more hypothetical imagining.

The more common experience of field researchers is to recognize, on entering any applied practice field, that the phenomenon of interest is in fact far more interesting

and complicated than they had initially anticipated. Human stories tend to provide you with tantalizing “distractors,” many of which could be clues to important new aspects, but you won’t know immediately which would lead you into blind alleys and which might ultimately prove productive lines of inquiry. Depending on the fundamental makeup of their character and the situation in which they find themselves (such as time pressure to complete a degree), individual researchers will operate on the basis of quite different instincts. The instinct for some researchers is to narrow the focus and try to put blinders on to obscure anything in the field that does not seem directly pertinent to the question at hand. This kind of researcher is looking for an excuse to get out of the field quickly before too much data confuses their analysis. The other extreme is the researcher who will always have more questions and curiosities and perpetually assume that the key to unlocking the entire conceptualization will be the gathering of just a little bit more data. The kind of assistance that a methodological orientation ought to provide, then, is not an explicit justification but rather a nudge to consider which kind of situation you are in and to help you create a logic that ensures a justifiable balance between both extremes.

An unfortunate pattern in much of the published qualitative health research, as well as that of other applied disciplines, is an overreliance on confident (but unsubstantiated) claims of achieving “saturation” as a justification for leaving the field and concluding data analysis (Malterud, 2012; Morse, 2015b; O’Reilly & Parker, 2013). While saturation terminology fits neatly within a research proposal and sounds reasonable to the uninformed ear, it is important to understand that the idea, whether expressed as data or theoretical saturation, is entirely and inherently dependent upon the coherence of the argument that you are building (Saunders et al., 2018). Data saturation, also known as information redundancy, implies that something has been heard so frequently that it can be anticipated; theoretical saturation, in keeping with the sociological origins of grounded theory, signals that the events under investigation have come to a sufficiently comprehensive end that their properties and conceptual dimensions have been thoroughly documented and that their complexity and variation have been fully captured (Sandelowski, 2008). Theoretical saturation, therefore, has come to be uncritically accepted as a standard for judging the quality of specific pieces of scholarship because it implies that the researcher has obtained sufficient depth and richness and has accounted for all variance required to justify theoretical claims about the full range of configurations within the social process in question. In the social science tradition, the claim that one has achieved saturation is an expression of the researcher’s confidence that no new variations on the theory would be likely to emerge from additional data collection.

While I have profound respect for those who use this concept appropriately in the context of social theorizing, I have serious concern about the term’s overuse as a hollow language signifier to justify the conclusion of data collection, which occurs in all too many applied qualitative study reports. I say this because the

expression has come to imply that one considers oneself to have obtained and interpreted sufficient data to fully understand all that is potentially relevant about an applied or practice phenomenon. In nursing, for example, my disciplinary epistemological orientation would require that I never close the door on new variations and diversities on a theme. While most patients might fit a dominant pattern, my professional mandate requires me to always be seeking that new nuance or diversity that might compromise an individual patient's care or point me to a variant on standard approaches. In fact, practice excellence requires that I retain this open curiosity for new possibilities. Thus, the potential for infinite experiential variation plays a leading role in determining what my disciplinary antennae are attuned to when I encounter each new patient. Accordingly, in the disciplinary context of health research, the idea that one would stake a claim that no new variation could emerge is antithetical to the epistemological foundations of practice knowledge, where it is more appropriate to recognize the inevitable forward progression of that which we are discerning through empirical means. Instead, what is needed in our applied research context is a more honest and authentic articulation of what one has been able to discern on the basis of the exposures one has achieved (or not achieved) through the research process. If the term saturation is to be applied at all, it seems more appropriate that it be used as a quality criterion by the intended audience to reference a certain quality of comprehensive and generalizable scholarship. It is not a fixed bar one can surmount or a descriptor one ought to attach to one's own work. Thus, the "data were saturated" or "theoretical saturation was achieved" become hollow statements, unlikely to be as credible to an intended disciplinary audience as would an explanation of what the researcher has actually done to attain a degree of confidence that the findings had become sufficiently well developed to warrant reporting (Thorne, 2020b). A much more logical and authentic rationale for setting sample size or justifying the conclusion of data collection is what Malterud, Siersma, and Guassora (2016) call "information power," which calls on the researcher to demonstrate a reasoned judgement based on the extensiveness of information that the sample actually holds.

Taking all of these complexities into consideration, it seems fair to suggest that smaller interpretive description studies can be well justified in having set somewhat arbitrary sample limits, as long as they demonstrate appropriate recognition that there would always be more to study. In the case of larger interpretive descriptions, an expanded scope of confidence can be defended on the basis of the kind of relevant variation and complexity that their burning question entails at this juncture in our evolution toward answering it.

### **Thinking through Data Collection and Analysis**

Your research proposal will necessarily go beyond claims of what data and how much of it you will seek, and there is much more to be said in later chapters

### BOX 5.2 A PATH TOWARD RECOVERY

Chronic fatigue syndrome is a complex and debilitating condition without a known biological basis or widely effective treatments. A Canadian team of medical researchers wanted to better understand the treatment choices and experiences of chronic fatigue patients who have experienced some level of recovery, so as to provide guidance for others struggling with this condition. What they learned from those they interviewed was that stigmatized and dismissive responses from medical clinicians had led to disengagement from the medical system and prompted exploration of other forms of treatment. They further found that success in obtaining some symptom relief was associated with individualized treatment plans, most of which included mind-body approaches. Developed without the guidance of a medical practitioner, these individualized approaches reflected their own understanding of their illness and available personal resources.

Hasan, Z., Kuyvenhoven, C., Chowdhury, M., Amoudi, L., Zeraatkar, D., Busse, J. W., Sadik, M., & Vanstone, M. (2024). Patient perspectives of recovery from myalgic encephalomyelitis/chronic fatigue syndrome: An interpretive description study. *Journal of Evaluation in Clinical Practice*, 30(2), 234–242. <https://doi.org/10.1111/jep.13938>

about the conduct of data collection and analysis. At the initial proposal-writing stage, however, it is important to be able to comment intelligently on what rules and principles you intend to follow in gathering and making sense of data and to project ahead to the kinds of analytic maneuvers you will take to produce findings. For example, it is difficult to imagine an interpretive description study that does not include some elements of *concurrent data collection and analysis* and that the analytic process that the disciplinary interpretive mind will bring to that aspect of the research would not involve *constant comparative analysis*. These two ideas are fairly central to a way of studying phenomena in which you start with the assumption that at least some aspects of the reality that you are studying are socially constructed; therefore, to uncover knowledge about those constructions, you will want to compare and contrast different kinds of manifestations of them. While straight description could occur in a study that gathers data first and thinks later, interpretive description will inevitably require that the ongoing engagement with data be strategically employed to confirm, test, explore, and expand on the conceptualizations that begin to form in your mind as soon as you enter the field.

Another central element of data collection and analysis in interpretive description is that you are seeking the kind of knowledge that must be inductively generated from within the data and developed within the context of that data. So, the

ideas (conceptual frameworks, extant theories, preconceptions deriving from your reflections) that you bring into the study will have to be carefully noted and regularly examined to be sure that they are not influencing what you see and hear in ways that you don't intend. While that precaution can be relatively easy to take with an explicit theory that is compartmentalized in your mind, it may be somewhat more difficult to do that with clinical practice or disciplinary knowledge (as in the old adage that it would not have been a fish that discovered water) (Schein, 1987). For example, in studying self-care decision-making among people with a chronic disease, you may find it difficult to "turn off" the part of your clinical mind that immediately wants to embark on patient teaching when your study participant begins to explain their intricate rationale for manipulating treatment protocols. Some careful thought as to the manner in which you will deal with your known disciplinary preconceptions—and you will distinguish those that may be socially constructed as opposed to fundamental (the inherent dignity of all persons, for example)—will help you create a personal guide to staying on the research path once you enter the applied practice field for the purpose of inquiry (Robinson & Thorne, 1988).

Because research proposal formats typically require a clear separation between data collection and analysis, you will be looking for ways of summarizing what you propose to do in the field in a manner that not only does justice to the underpinnings of the method but also helps those less familiar with qualitative approaches in general (or interpretive description in particular) feel comfortable that there is indeed a coherent organizing logic to your study design. In an earlier era, some qualitative researchers were inclined to describe the processes of data collection and analysis in somewhat soft and fuzzy language (with analysis being a form of "magic," or findings "emerging from the data," for example) (May, 1994; Morse, 1994). Although these are useful experiential observations (indeed, the workings of the human mind truly are quite marvelous and fascinating), they tend not to serve the demands of those seeking to explain their study approaches to unimaginative audiences. For this reason, it becomes important to identify and articulate the main approaches that you intend to use and the sequence within which you intend to use them in concrete and explicit language.

Depending on the data source(s) you have selected, you will find excellent resources within the qualitative research literature to guide your process. It is a good idea, for example, to develop an understanding around group dynamics and to build a skill set for communicating with groups before you try to enact a focus group study. Similarly, there is a great deal to be learned about research interviewing beyond what you may already know from the clinical practice interview context if interviewing is to become your primary data collection strategy. In fact, if you are proficient in interviewing patients for the purpose of assessment and taking clinical histories, for example, you may find that a lot of painful unlearning is required before you enter the research arena to ensure that you

aren't falling back on old patterns of "leading the witness." Similarly, participant observation requires a particular mindset and collection of reflective self-checking skills in order to tease out what is happening to you personally from what it is that you are seeing in the research setting. So some specific learning in relation to the specific data source is always a good idea.

While the qualitative research world is full of "cookbooks" that break out the processes of data collection and analysis into simple and neatly sequenced intellectual operations, the actual business of data collection and analysis is considerably more complex (Morse, 1994). However, a vague or overly complex statement of what these processes will look like may not be an advantage to your interpretive description research proposal. My recommendation, therefore, is to draw upon these kinds of guidelines where they seem appropriate as a general statement of what you expect to occur. For example, a number of authors (e.g., Colaizzi, 1978; Giorgi, 1985; Strauss & Corbin, 1998) have included in their methodological guidelines an abbreviated, sequenced set of steps that many researchers find helpful to reference. However, unlike the actual cookbook context, don't make the mistake of assuming that rigid adherence to them will make for a good qualitative study process. They tend to work far better as conceptual guides than rulebooks, and recognizing from the outset that you will be generally "informed" by them rather than "doing" them will help you write your plan with integrity.

### **Building in Credibility Indicators**

In the proposal stage of an interpretive description project, you will also be required to say something about the plan you intend for ensuring that your research results have integrity. It is fair to say that the matter of quality within qualitative health research is a highly complex and challenging topic, with much still unresolved and many ongoing disputes on the table. However, a research proposal is incomplete without some demonstration that the worth of the final product of research is not based simply on the researcher's claims (Thorne & Darbyshire, 2005) and that certain steps and procedures within the process of the research will be undertaken to ensure that there will be an appropriate degree of credibility to both the ingredients and to the outcome.

The validity and reliability that we are familiar with in the quantitative research world do not match the specific philosophical assumptions and aims that underscore qualitative work (Cypress, 2017; Thorne, 1997b). However, the general principles underlying these concepts do have relevance in the sense that qualitative researchers recognize the importance of having quality criteria reflecting agreed-upon ideas about the bases upon which data have been generated, findings arrived at, and conclusions rendered. For example, we would recognize that the claims made about a health phenomenon by an applied researcher within the current sociopolitical context will have a different currency than would similar

claims made by an informed bystander, a journalist, or a politician. A significant measure of that privilege comes from the assumption that the claims extend far beyond mere “opinion,” and, in fact, are based on recognizable methods for empirical reasoning. This platform of expertise that scientists benefit from would erode rapidly in the absence of shared bases upon which to determine the worth of research. In the qualitative research world, despite the ongoing and lively debate as to how best to accomplish credibility in our research designs, researchers are obliged to show serious thoughtfulness to this challenge and to identify some appropriate techniques that they intend to employ to assure the integrity of the process and product.

In the context of applied qualitative research, we might take that set of obligations one step further and recognize that our species of new knowledge will be made available to our intended disciplinary audiences in a form that enlightens them about dimensions of the thing we are studying. Consequently, we acknowledge that our findings may well be taken up in the practice context even without the benefit of what other scientists might consider essential testing. For example, if our in-depth interviews with cancer patients reveal a common dislike for certain expressions of compassion by professional health care providers, those clinicians reading our study report might find themselves unconsciously adjusting their behaviors in practice. While we generally assume that formal clinical procedural change will require multiple studies and systematic review of the body of evidence, there is much within the practice world that is actually highly sensitive to the findings of a well-timed, articulate, and powerful qualitative research presentation, especially if it matches the “clinical instincts” that our audiences are already predisposed to favor. Because so much of what we study qualitatively has the potential to tug at heartstrings or feed biases, there is considerable risk for the findings of any individual study to be uncritically accepted by an audience hungry for useful new ways to think about a phenomenon. It is therefore the applied researcher’s obligation to have anticipated this potential and ensured that all claims that will be made on the basis of the findings have been interrogated within the disciplinary logic and practice context of the audience to which they are addressed.

While credibility can be enhanced by the application of a wide range of procedures, some of those that have been particularly well received within the qualitative health research community are those articulated by Leininger (1994), who conceptualized six distinct evaluative criteria that should be considered as credibility, confirmability, meaning context, recurrent patterning, saturation, and transferability. Equally helpful are the “trustworthiness” elements of credibility, including transferability, dependability, and confirmability that Lincoln and Guba developed as ways of positioning a study as “worth paying attention to” (1985, p. 290). Within each of these dimensions, various researchers draw upon specific techniques that they intend to apply, such as triangulation of

data sources to enhance credibility, “member checking” to test confirmability, or expert panel analysis to support claims of dependability. While these techniques may bolster confidence in some dimension of credibility, the specific approaches that researchers select should be generated on the basis of what they are attempting to achieve beyond methodological precision or technical accuracy. Later, in Chapter 12, I will elaborate on what I argue may be better ways to think about the ultimate aim of credibility procedures within interpretive description, orienting our choices toward such criteria as epistemological integrity, representative credibility, analytic logic, and interpretive authority. Further, in order that their interpretive description products actually contribute to disciplinary knowledge, I suggest that it is important for applied researchers in the health fields in particular to position their inquiries in relation to an additional set of ideal criteria associated with their disciplinary orientation, including moral defensibility, disciplinary relevance, pragmatic obligation, contextual awareness, and probable truth (Thorne, 1997b).

All of these credibility measures orient us to the requirement that we build in sufficient strategies to keep our evolving data collection and analysis on target with our ultimate research purpose—the question with which we entered our study and the intended audience to whom we wish our findings to return. They create a means by which we can demonstrate to others, both in anticipation of our study and also in the eventual report, evidence of a form of “reflexive accounting” that is designed to lend what can be thought of as a measure of validity to the conclusions we will reach (Altheide & Johnson, 1994).

## Planning and Adapting

The paradox of good qualitative research planning is that you can never fully appreciate what will happen in a study or what protections and safeguards you might need to include in order to ensure that all of the threats to credibility and trustworthiness will be overcome along the way. While a loose plan (of the “trust me to figure it out as I go” variety) is highly unlikely to pass muster with your graduate supervisory committee, your grant funding review panel, or your institutional ethics review board, an overly rigid one may lock you into procedures and elements that are unnecessary or even counterproductive to your ultimate aims. Further, the more complex and intricate your initial plan, the harder you may find it to assume a standpoint that allows you to observe it from an objective distance and see “the forest for the trees” once you are actually in the middle of the project. Simply writing a logical design and then following it will not ensure high-quality findings, and paying compulsive attention to the design details creates the risk of turning your study into a hollow exercise.

The point of an interpretive description research plan is therefore to create a solid foundation for the principles underlying the choices you are going to

be making along the journey and to articulate a logical and credible sequence of intended intellectual and procedural activities you expect to enact in order to reach your goal. You are, in effect, positioning yourself to be able to engage deeply in understanding the phenomenon that sparked your interest in the first place, invoking a full set of analytic steps in coming to know its structure and nature, and creating the building blocks upon which you hope to generate meaningful new knowledge. While interpretive description does not give you the (apparent) luxury of a lockstep set of design decisions, it does offer a framework within which the design decisions that work for your particular question can be effectively thought through and set forth. Although that may initially feel like a somewhat less solid foundation than you might have with a prefabricated design, it has two real advantages: (1) the design you come up with will be one that supports the particular kind of question you are asking, and (2) the planning logic that you put into the initial phases of your study will serve you brilliantly in avoiding multiple pitfalls in the actual conduct of your research. Your goal, after all, is to come away with findings that advance understanding in your field, not simply to have lived through the process! While it is sensible to make some of the overall design decisions on a somewhat pragmatic basis, the key to your success will lie in your ability to predict and appreciate the implications of each decision for the integrity of the whole. As you explore all of the available options, you realize that you must make trade-offs and limit your choices within the full set of possibilities (Patton, 2002).

In this set of chapters, we've provided a brief overview of the origins of interpretive description and the logic of research project planning. In the next set of chapters, we will delve in more detail into the specific implications of the many options you will have for inductively engaging with data using an interpretive description approach.

**PART II**

Interpretive Description  
in Action



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# 6

## ENTERING THE FIELD

Having thought through a study proposal, you are ready to move into conversations about the actual process of conducting an interpretive description. As with any design, there can be a gap between the articulation of an idea in the proposal stage and the actual doing once you have clearance to go forward. What can read as a simple line within a proposal (such as “once I have gained entry into the field”) can turn out to be a complicated and difficult dynamic once the very real nuances of your particular situation reveal themselves and you are faced with dilemmas for which you may not have been prepared. This again is a time in which colleagues and mentors who have walked the path of research before in your settings can be invaluable, and if you haven’t cultivated such colleagues before this stage, this might be the appropriate moment. In this and the following four chapters, I will discuss the kinds of representation and responsibility issues that commonly arise for newer researchers in particular and will present some thoughts about solutions.

Just as the design logic of interpretive description study permits considerable latitude in relation to most steps within the proposed research, the various dimensions of “interpretive-description-in-action” can be enacted in many different ways by different researchers within their distinctive contexts. What interpretive description provides is a rationale for working out these elements according to the requirements of an applied discipline—that is, a discipline in which action must necessarily occur even in the absence of the new knowledge, but the new knowledge you are seeking has the potential to shape or influence aspects of that action simply by its capacity to shift perception among practitioners. Thus, the choices that one makes with interpretive description draw from the wonderful legacy that the social science methods have left us but select

from them using the full mantle of responsibility that holding ideas within a practice discipline entails. This principle will guide all aspects of the choices each researcher makes within this rubric and will distinguish the findings of interpretive descriptions from the products that have adhered more closely to the tenets of the other methods. While interpretive description products will take a wide range of forms, there will still be a “look and feel” to them that makes them recognizable as consistent with the vision of high-quality applied research that is the motivation for this kind of qualitative direction.

That said, the challenge now is to begin to identify what options can be consistent with an interpretive description logic and how one might work through the decisions with which you will necessarily be confronted in designing your research project. Here, I’ll offer some thoughts and opinions, many of which could be said to be a matter of personal preference and style rather than fundamental requirements of the interpretive description approach. If the reader will indulge me the opportunity to offer the kind of guidance that I might share in discussion with colleagues and graduate students in relation to these challenges, then the ideas here are offered as one basis for guiding sound logic in the interpretive description context, not as a rigid prescription for its requirements.

### **Situating Self within the Research Role**

While armchair theorizing can be quite compelling entertainment, applied practice researchers really come alive when they are finally at the stage of being able to enter the study setting and interact with their sources of data. In most instances, people (study participants) will be the primary source of data, and a fascination for people within the applied context is likely what inspired the study in the first place. However, doing research is seldom what one imagined it would be at the outset of a research career, and there are many caveats and cautions related to dealing with people that are well worth attending to in order to prevent problems that can threaten your continuation within the research setting, the integrity of the data you will collect, or potentially the credibility of the entire project. Many of these elements combine ethical, theoretical, and practical aspects, and so we will intertwine discussion of these issues with descriptions of some common challenges and suggested solutions.

Despite being drawn to qualitative research because of their enthusiasm for subjective experiential practice knowledge, many applied practitioners find the transition into the role of researcher considerably more difficult than they had first imagined. One tends to feel confident and comfortable interacting with clients within one’s practice setting, and the idea of having the luxury of spending more time with the people who have inspired that enthusiasm is highly attractive. However, you will find that there are various aspects of that “former self”

that you may have to abandon temporarily in order to take on the new challenge of becoming the instrument of credible and meaningful research.

### ***Tracking Reflections***

First, as was discussed in Chapter 3, you will need to carefully acknowledge and document the nature and substance of the ideas you hold about the phenomenon you are studying before you enter the field. This process will continue throughout the course of your entire study, but perhaps most particularly during the data collection and analysis processes. While reflexivity is an inherent element of all qualitative inquiry, and reference to it is easily included in any plan, the process, relevance, and meaning of it are far from straightforward (Finlay, 2002). Nevertheless, documenting something of what is happening to you subjectively and conceptually within the research engagement becomes a core element informing your inductive analytic process.

You might accomplish this through a field notebook or a personal “reflective journal” that will become an important part of your research documentation (Phillippi & Lauderdale, 2018). In general, although it might seem in the moment to be so self-evident that you would never forget it, it is always best to create explicit places to document such background material and to ensure that you have access to that material for further reference and elaboration as the research process unfolds. While it may not become “data” per se, it does become a very critical part of what you will rely on to understand the implications of your own role in data collection and construction. Depending upon your own preference and style, you might maintain a single research notebook (electronic or paper) in which you record all of the thoughts, questions, and ideas that occur to you as your study progresses. Or you might create separate places in which to record background preconceptions (theoretical allegiances, your expert clinical opinion, other sources of prior knowledge) and your ongoing analytical notes (questions, inspirations, and evolving interpretations). In either case, ensure that these become part of your life as a researcher, that they are always available (for those quick notes in the middle of the night, etc.), and that they are regularly maintained. As with all data, it goes without saying that you will want to ensure you have regular mechanisms for backing these up or protecting yourself against loss during the project.

### ***Learning Not to Lead***

A second aspect of becoming an effective researcher has to do with “undoing” your clinical practice engagement and communication techniques. Most likely, you are accustomed to greeting new clients with the confidence of a seasoned practitioner, expecting some clarity within the roles (of them seeking assistance

and you knowing how to provide it), and communicating with them, at least initially, on the basis of an explicit or implied set of practice parameters (the assessment interview, for example). You know the scene; you know where you are going with each conversation, and you are, for the most part, in control of the direction the interaction will take. While you have very likely engaged in many practice interactions that seem less purposeful than what I am describing, those new to the applied research world are almost always surprised at how difficult it can be to shift into this new persona. Essentially, you are taking on the role of someone who does not know, who has entered the study participants' world in order to know, and who cannot bring that expertise into shaping the conversation as it unfolds. Research interviews, as we will see later in this chapter, are markedly different from practice or clinical interviews, and the practitioner's tendency to "lead the witness" can take considerable undoing as you work toward mastering the skill of research interviews (Hutchinson & Wilson, 1994; Lipson, 1989). A classic source of excellent guidance on the research interview that has been adopted and applied across a range of methodological traditions over time is James Spradley's text on the "ethnographic interview" (1979). Through a detailed depiction of the attitude, conversational options, and focus of the interview itself, Spradley's text has helped many applied practice researchers become aware of their clinical communication habits and create strategies for managing those that might influence the research interview in an untoward manner.

### *Disclosing the Discipline*

A third issue is how one will introduce or portray oneself to potential study participants. In an earlier chapter, we raised some of the considerations relative to positioning oneself within the study, but that step is quite different from explaining oneself to those with whom one hopes to engage to learn something about subjective experiential matters. For example, if we frontload our introductions to potential study participants with our theoretical positions (feminist, critical social theorizing, humanist, holistic, and so on), we already bias who is likely to accept our invitation to participate and what they will say when we engage with them. Alternatively, if we hold strong theoretical views and attempt to mask or obscure them, we are clearly misrepresenting our intent. A potential study participant who believes that we are seeking knowledge to help nurses better understand patients with a particular condition may be much more comfortable accepting our invitation than might one who believes that we are studying people with their condition in order to explore general societal power imbalances as they play out in the narratives of sick persons. So our motivation does become an important element in shaping our access to data as well as the constructions that we will arrive at on the basis of our engagement with the field.

One particular challenge for applied researchers in the health professions is the recognition that many patients might well relish the opportunity to spend a

significant period of time with a professional health care provider for reasons other than contributing to knowledge. They may unwittingly hope that they'll gain further information about their medical condition, have the opportunity to confirm their own theories or strategies about managing it, or seek to create a somewhat indebted relationship with an "insider" within the care system. Thus, the process of situating oneself does require some careful strategizing in order to avoid inappropriate expectations and ensure as much clarity as possible within the research engagement process. Because boundary transgressions violate both professional practice mandates and the requirements for ethical conduct of research with human subjects, these are important considerations, and they become part of the critical process of setting and maintaining appropriate boundaries within the research relationship (Dickson-Swift et al., 2006; Hartrick Doane, Storch, & Pauly, 2009). While acknowledging a professional allegiance does create these kinds of drawbacks, obscuring that information seems quite unethical. Thus, health professional researchers may be required to find a way to explain the interest in the topic from a professional background, combined with the current role of being the "learner" from the individuals who hold the expertise in subjective experience—the patients themselves. This two-dimensional introduction provides some clarity in both the source of interest in the question and in the expectations for engagement and permits the researcher to make explicit that the benefit of the research will be knowledge that may help enlighten fellow professionals for the benefit of future patients.

### *Stepping Out of Role*

Despite all good intentions to be true to the researcher role, I doubt that it is really possible to discard one's larger social mandate as a health care professional engaging in the research of one's profession (Robinson & Thorne, 1988). It is well recognized by clinical researchers that occasions will arise in which the distress of the study participant, the seriousness of their misinformation, or the acuity of the clinical concern may have to "trump" the research agenda (Arber, 2006; Austin, 2013). One mechanism that may work as a general rule for such situations is to bifurcate the research interview—gather data first and shift into a clinical conversation afterwards. In my own view, that may not always be feasible or even ethical, and therefore a more conceptual understanding of what is happening in the situation and what will or will not constitute a compromise to your research is required. Here, the value of the reflective notebook comes into play, because it becomes a place where that fine line between being therapeutic and serving a research agenda can be explicitly dissected and examined. Through regular critical self-inquiry, the researcher can develop a multidimensional understanding of where the "learner side" is dominant and where some elements of the "clinician side" may have been called into action. When the interview has shifted for all or part of a session into the more clinical context for

any reason, decisions will have to be taken with regard to whether the data have been “tainted” such that they cannot be used within the analysis or whether elements of the data may still be appropriate for research use. Clearly, that decision will depend upon the phenomenon being studied and the interaction between the specific clinical encounter and the story being told.

### *Revealing and Concealing*

A related tricky issue that arises in the context of a number of interpretive description studies is the explicit personal location of the researcher within the content of the question that is being posed. This issue arises most dramatically where the topic is one for which there would be common recognition that personal experience shapes understanding. For example, in a study of experiences with interpersonal violence, it might be important for the researchers to develop a clear and consistent message as to their own relationship to the topic, not only to frame the interest but also because they expect to be asked. Since “I don’t feel comfortable disclosing my personal situation to you” is quite likely to set up a natural resistance to the interview process, more respectful and constructive options are in order. Most researchers do decide to avoid revealing too much personal information unless explicitly asked, since “sharing” does add to the burden of keeping a research interview on target for its intended purpose. Where the researcher acknowledges personal experience with the phenomenon being studied, the study participant may assume a shared understanding and therefore neglect to provide explanatory depth on something that could be quite important to the subsequent data analysis. There is also a great temptation to “compare notes,” which then conveys the idea that there is a “right way” to have experienced the matter. It is always important to remember that there are very powerful “social protocols” for sharing discourses at play, and having entered the space of being “fellow travelers” in a challenging world, it is rarely possible to regain the advantages that the “outsider” inquirer stance may have brought to your inquiry.

In my view, there is no inherently right answer to the dilemma of disclosure, particularly in relation to sensitive topics. You may decide to find a way of diverting the study participant’s question away from your own experience and back toward their own, perhaps even indicating that you would be open to having that conversation following the interview proper. Or you may explain why, in your opinion, it is important that the focus of the interview remain on the study participant, as possibly knowing your own (non-professional) relationship to the topic could inadvertently influence the way the story is told. Just as with your practice knowledge, emphasizing your enthusiasm for the opportunity to appreciatively learn from “their” experience rather than assuming that your prior knowledge is valid can be an effective way to sidestep these difficult conversations. However, some study participants will insist, and applied researchers tend not to want to

tell a lie or conceal that which would impair trust. So, thinking through how, if you do have some personal exposure to the issue, you will explain that without undue fanfare and then guide the interview back to the study participant's story, accounting for any potential influence that the disclosure might have on the data that subsequently arise, may be an important element in preparing yourself to conduct the interpretive description.

### *Negotiating Informed Consent*

Although your setting and institution will undoubtedly have explicit procedures and policies related to informed consent to participate in a study, the complexity of attending with integrity to informed consent, both at the outset and on an ongoing basis, has long been recognized as a particular challenge for qualitative researchers in general (Klykken, 2022; van den Hoonaard & van den Hoonaard, 2013). Essentially, because the focus of your inquiry is human subjective experiential knowledge, the researcher cannot fully predetermine what will happen in the research encounter. Unlike quantitative investigations, in which the specific questions that will be posed are an essential element in the study design, there is an “emergent” quality to interpretive description (as with many qualitative approaches) that explicitly requires following leads suggested by the study participants and capitalizing on linkages among bits of data as you progress through the research. Because of this, the “interview schedule” characteristic of conventional descriptive research would be a misnomer. Rather, most practitioners of interpretive description navigate the informed consent process with an explanation of the relationship between data collection and analysis combined with some formal indication of their “best guess” as to how the typical interview will proceed. Instead of a formal and structured interview protocol, for example, you might generate a document entitled “sample trigger questions for initial interview” or “general focus group guide,” for example—something that illustrates the anticipated range and scope of the inquiry, assuring your review panels, institutional setting authorities, and sometimes even proposed study participants (should they request to see it) of the “general idea” of the scope and boundaries of your intended investigation.

Most of us are not terribly accustomed to having a stranger listen at length to our story or focus with serious intent upon our personal experiences and opinions. The experience of “being heard” is well recognized as a profound one, and this becomes important as we reflect on what our study participants reveal as we guide them ever more deeply into describing elements of their subjective experiences. The paradox is that really “good data” often reflects deeply felt and infrequently articulated material, and as our study participants come closer to such revelations, our moral obligation toward ongoing negotiation of informed consent is intensified (Austin, 2013).

While it is easy to recognize that coercing ongoing participation through trickery or manipulation would be highly unethical, qualitative researchers can easily lose sight of the implications of neediness, loneliness, or even the feeling of self-importance that can derive from being “studied.” To capitalize in any way on these kinds of secondary gains to advantage our quest for “great data” would constitute a boundary violation inconsistent with ethical research. Thus, the business of informed consent within the interpretive description approach is best constituted as an ongoing moral obligation, enacted in verbal as well as non-verbal behavior, with the goal of creating the optimal conditions to ensure that the people we study reveal what they are comfortable sharing and no more. As will be discussed in later chapters, there may be considerable value in the strategy of multiple exposures to a study participant in ensuring that consent remains informed. Where an interview becomes emotional or “secret” information is revealed, for example, researchers might build in a time delay before continuing on that line of questioning, allowing for reflection and reconsideration rather than taking advantage of the immediate impulse. Alternatively, they might step back from the inquiry and create a momentary “pause,” acknowledging that the interview has entered difficult territory and inviting the participants to take a moment to reflect on whether they wish to continue. The nuances and complexities of engaging with study participants in such a manner as to ensure their ongoing consent are somewhat beyond the scope of this brief discussion. However, numerous excellent guides exist to help you expand on these matters, especially with regard to sensitive topics and vulnerable populations (e.g., Aluwihare-Samaranayake, 2012; Hall, 2013; Pittaway, Bartolomei, & Hugman, 2010; Reid et al., 2018; Sieber & Tolich, 2013; van den Hoonaard & van den Hoonaard, 2013). There is also an emerging literature on supporting the researcher who is engaging with interviewing on such topics (Mallon & Elliott, 2019). Reflecting on these issues can help locate the expectations of any interpretive description study within this fundamentally important larger context of what it means to “situate the self.”

### *Finding Your Tongue*

What most health professionals find when they first engage in qualitative research interviews is an uncomfortable sense of “nakedness” without their usual repertoire of conversational tools. While they can get through their introductory remarks fairly easily, the going gets a bit rougher once they are into the interview proper and trying to encourage people to move in the intended direction without overly directing the interaction. Unlike the clinical encounter, the use of value-laden prompts (“that’s good,” or “I agree,” or even “I understand”) is generally forbidden, since they clearly let the participant know that a certain species of data will be well received and imply the corollary that, if there is contrary

data within their own complicated situation, it might not. What the qualitative research interview context asks you to do is suspend the idea that understanding is ever complete—to prompt for further clarification or elaboration rather than to signal that you understand completely. Responding in this manner feels counterintuitive to most practice professionals, for whom conveying the idea of understanding is fundamental to caring communication. One tends to feel rather silly when limited to “hmm hmm” and “say more,” and the urge to assure your study participant that you are not at all like those dispassionate professionals being referenced can become almost overpowering.

What becomes necessary, then, is a repertoire of “good questions” that you can draw upon as your interviews progress so that you have options beyond the dispassionate “hmm hmm.” Kinds of questions that you may rehearse in advance so that they are ready when you need them might include: “I’m really interested in the way you are describing that. Can you give me a bit more detail about how that happened?” or “Was that surprising to you?” or “A few minutes ago, you mentioned X. Was this new episode anything like that, or did you see some differences?” With these kinds of explorative questions, you are signaling sustained interest in your study participants’ thought processes and experiences, encouraging reflective interpretation, and communicating an interest in the fine detail of their experience that will in itself express respect and compassion. Within interviews, it is possible to capitalize on the luxury of learning from your study participants as you facilitate the flow of the interview while not saying anything that would compromise your data. Because you are concurrently collecting and analyzing data, it is entirely appropriate to draw generally on the larger data set as a point of reference, using such questions as “Some others I have spoken with have found this aspect of their experience among the most difficult. Is that how it is with you? And do you have any thoughts as to why that might be?” or “I’ve been hearing somewhat similar things from others, and I’d love to better understand it. Can you tell me more?” When you are deprived of your usual mechanisms for expressing the level of human concern and compassion that might have been called for in your applied practice context, what can help is a clear understanding that, effectively conducted, your research interview will leave your study participants feeling honored by being deeply heard and with the hope that their experiential knowledge may contribute to the betterment of care or service for others in the future. By concluding your interview with a summary of the key messages that you have heard (and will take away and reflect upon), you will have further demonstrated the value that the interview has had toward that greater purpose.

### ***Constraining Your Influence***

A final priority within the process of situating yourself with your study participants is recognizing and taking responsibility for your privileged capacity to

shape the data collected and analyzed as a result of your engagement with the study. There are two general areas of “influence” that the researcher should be mindful of throughout, both to ensure that your research relationship maintains its ethical base and to safeguard the integrity of the findings (Mertens, 2018).

Earlier, we discussed the matter of disclosing one’s disciplinary orientation and understanding that it might create some expectations for the research relationship. Another potential effect of the disciplinary role is that it might afford certain advantages in relation to the data that become available through the research process. Nurses, for example, are well aware that their professional background often makes certain species of data more readily available to them than it might be to other researchers. People assume that nurses would be comfortable, for example, with details of various bodily products and functions that are normally kept more private. Similarly, I would imagine that bankers might be more likely to hear details of someone’s financial status and lawyers to hear about their adventures in tax evasion.

In the world of experiential knowledge, there is no way one can study a phenomenon without running the risk of changing it (Zahle, 2023). Merely by attending to selected aspects of an experience or soliciting elaboration on its elements, the researcher may be inadvertently triggering subtle or not-so-subtle shifts in meaning (Monahan & Fisher, 2010). In recognition of this, practitioners of interpretive description must be mindful throughout the study of the bases upon which their interpretations are formed and the personal or ideational influences that they are having upon the data sources. The point here is that simply by being what and who we are, we will have influenced what is revealed to us and the material that we will be using when we construct our accounts of the study. We can’t completely avoid this influence, but we can be mindful of it and take steps to ensure that we are as aware as we can possibly be of the way it plays out and the meaning that our study process will have on the eventual product.

The second dimension of influence control is closely associated with the larger principle of informed consent. When individuals have enrolled in our study, they have been provided with certain information about the nature and purpose of the study and the manner in which the findings will be used. While the explanations may have alluded to the idea that aspects of the analysis would be emergent and developed on the basis of an iterative analysis, there is generally an agreed-upon acceptance that the scope and purpose must be sustained throughout the study (Austin, 2013). Because the researcher has the potential of exerting influence upon the participants and therefore upon the data, and because ideas may well arise from the data that were not anticipated at the outset, there is also an ongoing obligation to align the direction of the study findings with the motivation of the individuals who participated in creating them. Thus, if individuals have consented to be interviewed as to their experience with preoperative teaching for a particular surgical procedure, they will not expect that the study

### BOX 6.1 LEARNING WHAT MIGHT HELP

Obstetric fistula is an abnormal opening between the vagina and rectum. Most prevalent in low-resource settings, it is caused by prolonged obstructed labor and constitutes a lasting harm to the women affected. These researchers in Nigeria noted that, while preventative measures had been proposed, they had not been informed by women's own views. They therefore interviewed a sample of affected women recruited through an obstetric fistula repair center. What they learned was the extent to which compromised autonomy and decision-making power create the conditions under which fistula occurs for these women. Their capacity to determine where to give birth safely requires attention to economic empowerment and infrastructure enhancements such as transportation, as well as reduction of financial and geographic barriers to formally educated midwives and traditional birth attendants.

Bulndi, L. B., Ireson, D., Adama, E., & Bayes, S. (2023). Women's views on obstetric fistula risk factors and prevention in north-central Nigeria: An interpretive descriptive study. *BMJ Open*, 13(6), e066923. <https://doi.org/10.1136/bmjopen-2022-066923>

findings will become a condemnation of the surgical technique or the surgeon's personal habits. While they may consistently have revealed common information about those aspects of their story, particularly if the researcher seemed interested, it could be a significant violation of their consent to divert the product of the research toward objectives they might not have sanctioned.

This matter of constraining one's influence is far from straightforward (van den Hoonard & van den Hoonard, 2013). However, it is an aspect of situating yourself within the research encounter that must be considered and attended to both at the outset and as the investigation unfolds. And as with all of the dimensions that have been listed here, it provides "something to think about" in the conduct of the research rather than an ironclad rule as to proper procedure.

### Situating Self within the Setting

A second major challenge associated with situating yourself within the setting is the matter of sorting out how to represent yourself and advocate on behalf of your study within the practice setting in which you are conducting your study or recruiting your study participants. Unlike ethnographers, who tend to assume the need to fight their way into the field and spend time establishing relationships once there (Franklin et al., 2012), applied practice researchers often have a misguided optimism about ease of entry and access. Although they know how to

“work systems” as professionals, they often find that these same systems are not nearly as friendly to them once they don their researcher hat.

### *Insiders and Outsiders*

Applied practitioner researchers often have the option of doing a study within a setting that is already well known to them by virtue of their professional experience or, alternatively, locating their study in a setting with which they are generally familiar but that involves people with whom they have not previously interacted. As with many of the decisions that one takes in the course of an interpretive description study, there are pros and cons associated with either option, or there may be features of both options in the context of the study as it plays out (Ademolu, 2024; Allen, 2004). The best approach for your study will be informed by a thoughtful consideration of the implications of positionality within all predictable aspects of the specific study context.

An advantage of being an “insider” may be that you can bypass the early “introductions” stage and relatively easily identify who holds authority to support your project. There may be various advantages associated with having insider privilege, including more straightforward access to information, consultation, and background contextual information. However, there are also significant disadvantages that may outweigh the benefits (Field, 1989; Moore, 2012). Insiders often find it more difficult to “step out of role” and may find themselves drawn into practice-related activity during times of research engagement. Clients within a health care or service setting tend to find it highly confusing if the same individual assumes different roles at different times, and there is a significantly increased risk of coercion into participation if a prior relationship between the researcher and the clinical team is apparent. Insiders are also far more likely to absorb untested assumptions about how things are done, and when study participants know that researchers are insiders, they may well shape their stories accordingly or avoid raising matters that could place the researcher in a compromising position with colleagues. All of these are daunting propositions, requiring careful attention and reflection to ensure that the research process is managed with the utmost integrity.

In contrast, being an “outsider” to the setting tends to bump one up against all of the predictable resistances that practice or clinical settings are famous for—restricting access to information, prioritizing everything above research, selectively sharing knowledge relevant to the study, and so on. It can take time to build relationships with staff when you don’t know the leaders, the factions, and the history that make up the internal culture. You are likely to be seen as an intruder, someone who is associated with extra work on the part of the staff, or worse—someone who may have a hidden agenda associated with exposing poor practices or challenging the social order. Since qualitative health researchers are characteristically interested in understanding how the world looks from the human participant’s perspective, they

may be even more prone than quantitative researchers to suspicion and resistance in this regard. This may take the form of complex permissions sequences, competing ethics approval requirements, or contested “ownership” of patients’ or clients’ information. The net effect of that kind of contextual challenge could be that the researcher becomes highly attuned to the plight of the persons attempting to navigate that same system and potentially hostile to the setting itself.

### *Navigating Access*

As all researchers in the current health care regulatory context are acutely aware, access to sites of patient data collection is highly controlled by a set of checks and balances against coercion, misrepresentation, and misuse of information (Franklin et al., 2012). It is essential that these various procedures and policies be taken very seriously and that the researcher enter the setting well armed with as full an understanding as possible of the current rule structures and requirements.

It is also the case that, despite their theoretical enthusiasm for the value of knowledge generation, most practice settings do find a researcher to be something of a nuisance. There are rules to be explained, information provided, and often a requirement that you work through designated individuals to schedule your access to the setting or to potential recruits for the study (Chughtai & Myers, 2017). It goes without saying that a profound respect for the very real challenge that you are imposing on the setting by virtue of trying to enact your study within it will go a long way to paving the path for your entrée. Similarly, your ability to adapt to the changing climate and accommodate yourself to the needs of the setting (as long as they don’t compromise your study) will be instrumental in achieving success. You would do well to keep reminding yourself that your practice colleagues are not as immersed as you are in the rules and procedures of research, and so the obligation necessarily falls to you to do the work of navigation and ensuring that the appropriate people know what you are doing, when, and why (Punch, 1994). Some important strategies that are applicable across settings include clear communications about when you will and will not be present and what you will actually be doing when you are on site; ensuring that all staff have access to appropriate background information about your study, including full contact information in the event that any problems or questions associated with your study arise; and making every effort to respectfully accommodate the setting and its people whenever your needs and theirs collide.

### *Watching and Doing*

Just as study participants may be influenced by the disciplinary background of the investigator, a clinical setting cannot help but be influenced by the professional credibility of the research “visitor.” The case of nurses doing research in a hospital setting is perhaps typical of the challenge. Even if one is simply on site to gather names of prospective study participants, it becomes almost impossible

to maintain an entirely neutral stance. You instinctively reach out to steer a wheelchair that has got stuck passing through a doorway, find someone to help the patient who is crying out for assistance, or step in to lend a hand where a staff member suddenly seems to be struggling with an awkward patient transfer. For this reason, it is somewhat rare for health professional researchers to consider their observations “pure,” and more common to describe their intentions in the form of “participant observation.” By acknowledging that dual role, they ensure that careful attention will be paid to the manner in which their participation might influence or shape that observation as the events of the fieldwork unfold.

Being a participant observer demands thoughtful attention to how much and what kind of participation will be appropriate within the context of your study as well as in keeping with the safety and risk management requirements of the institution. For example, nurse researchers might explicitly describe their participation as involving assisting with basic patient care but not administering medications or treatments. In all such instances, it will be important to have fully assessed and followed the institution’s documentation and tracking requirements, as you have de facto become a part of the context that might affect patient outcomes.

Many applied practice researchers find that some level of participant observation within an interpretive description study can be a real asset to the project if handled wisely. It is much easier to build trusting relationships with staff (and gatekeepers) if you are helping out rather than sitting like the proverbial bump on a log, and a modicum of participation can help you gain further perspective on the context. It can demonstrate respect for the members of the setting and give them something in return for their efforts to support you in the study. As with all of these delicate balancing acts, however, it will be of the utmost importance to keep notes and reflect on the implications that the participation may have had on what you have access to, what you see, and how you understand it.

### *Staying Safe*

Although researchers using interpretive description may access their study participants through clinical or similar service settings, in many instances they may engage with the persons they are studying in contexts that are distinct from the practice situation. For example, whereas access to information and the initial introduction to a potential participant may be highly regulated within the clinic, once individuals have accepted the invitation to participate in your study, they are unlikely to consider the clinic to have any bearing on the continuation of that relationship. Further, since many interpretive description researchers prefer that data collection takes place within a context that is as natural as possible, conducting interviews at homes, offices, or convenient public locations is quite common. While conducting research in this manner does get you out of the way of the regimented environment of the clinic, it raises another important set of challenges.

Health professionals are accustomed to dealing with all manner of individuals, including those that might be considered somewhat unsavory or downright unsafe within the clinical context. They rely upon the “safety nets” that are implied within the health care setting and typically work hard to overcome any apparent tension that encounters with such “difficult” patients might imply. Thus, for those accustomed to institutional settings, it is quite possible to have an inflated sense of confidence that one can handle any encounter. In opening up dialogue about new and potentially difficult aspects of human experience, the research encounter can expose both researcher and participant to complex challenges associated with emotional safety (Williamson & Burns, 2014). And when the research encounter shifts to a location that may be most natural for the study participant, or conducive to confidential interviewing, the researcher must also address a number of physical safety concerns (Paterson, Gregory, & Thorne, 1999). Others must know your whereabouts, you must have access to emergency phone support, and you must have a clearly arranged “escape plan” that can be put into action should you find yourself in a situation in which your instincts tell you your safety may not be assured. While this might be self-evident to researchers conducting studies of certain high-risk populations, it can be less evident when there is no such explicit focus. However, it is important to remember that when you enter the home of someone else, you are no longer on your own turf, and surprises can occur.

### *Honoring Confidentiality*

All researchers understand and submit to explicit requirements about confidentiality in relation to the process and product of the research. Beyond those explicit requirements, however, there is a “grey zone” associated with the kind of information that may come your way when successfully working within a system. By its very nature, interpretive description uncovers perceptions rather than facts. In many instances, such as when studying persons living with various health conditions, you may well encounter perceptions and information about other patients, about individual health care practitioners, and about the operations of various health care settings. While it can be awfully tempting to tell practitioners how many wonderful things you have heard about their care from your study participants, know that this kind of disclosure breaches confidentiality just as much as if you were reporting their poor performance. In either instance, your report violates the trust that the setting has placed in you with respect to how you will use the information that you have gained access to through your interactions with their staff or clients.

At the outset of a study, it can be difficult to appreciate just how complicated institutional confidentiality can be. Your ethics approval and the documentation of your plan in the research proposal may be public domain information, and the agency may be pleased to openly acknowledge your involvement. However, if

and when findings that might reflect badly on the institution arise, you may be in a very difficult position if you have made a commitment to disclose the name of the institution. For this reason, many researchers find value in using multiple settings and in being oblique in their references to specific institutions (for example, calling it “a comprehensive tertiary care center in a large Western Canadian province”). In a field such as health care, especially having entered your study on behalf of patients, it can be easy to find fault with systems like those involved with health care delivery. However, do be aware that your “whistle blowing” may well jeopardize your study and those of subsequent researchers if you are not diplomatic, professional, and respectful in the manner in which you describe and interpret what you have seen and heard. It can help to remember that, as a researcher building your research within the perspective of an applied discipline, your ultimate goal is to engage systems in making constructive change, not alienating them from the findings you produce.

# 7

## CONSTRUCTING AND MANAGING DATA

### **The Process of Engaging with Data**

Even as you begin the process of gaining entry into the field for your interpretive description study, you are already making that subtle shift between anticipating data collection and beginning to construct your ultimate data set. In the research proposal, you will have stated clearly delineated processes for both data collection and data analysis, with specific steps and procedures for each, and then provided some explanation about the interrelated nature of those two steps within an inductively driven empirical inquiry. While you might have convinced your reviewers (and yourself) that you can keep these steps separate in your mind, you may well find that the actual practices of data collection and analysis feel much more interdependent and complicated than you anticipated.

First, it is important to challenge the idea that there are bits of data passively waiting out there to be gathered, and they will be self-evident when you spot them. The world is full of sights, sounds, smells, impressions, observations, and experiences, and you will be focusing your attention quite purposefully toward a particular species of these for the explicit purpose of harvesting that which might inform knowledge about one particular phenomenon or concern. Although you may have been thinking and writing about that phenomenon for many months and feel like it will be easy to recognize it when you see it, you are now positioning yourself to remain conscious that you cannot yet accurately judge what is or is not a core ingredient of it and what might be influential upon it. You are therefore necessarily going to have to look broadly at the phenomenon or concern, scanning a wide circle of possibly relevant impressions and insights about it as part of the mental process you will use toward figuring out what you

will consider your data set to contain, what will be related but more tangential, and what is only peripherally relevant. Thus, from the outset of your study, you are not “collecting” data as much as you are “constructing” an understanding of what constitutes data relevant to the research question you have posed and how you will articulate it as such.

In the conventional model of descriptive research, you would enter the field with carefully framed questions, and data would constitute whatever answers were provided to those questions (scores on scales, replies to interview questions, and so on). Those data collection techniques were designed at the outset to narrow the range of possibilities for what you were seeking and to minimize your capacity as a curious researcher for probing further toward exploring what might lie underneath the initial responses. In contrast, interpretive description explicitly capitalizes on the idea that surface answers are usually a bit misleading in the sense that they provide “top of mind” responses but not the kind of in-depth, rich, and nuanced understandings of what else is happening that will explain those responses. Think, for example, of how normal social discourse typically goes: When you pose the question, “Hi, how are you?” the predictable rejoinder of “Fine” reveals absolutely nothing that is truly meaningful. In contrast, in an interpretive description study, we have the luxury of a method that allows us to dive into the muddy complexities that underlie those superficial or socially acceptable responses, to explore the contradictions and convolutions that constitute the human experience of the issue we are concerned with, and to render a kind of knowledge that informs us more deeply than is possible with a compilation of only that which is easier to surface. While surface material may have some relevance in some kinds of inquiries, it is not what drives us to interpretive description.

When we use the term “construction” in relation to the data collection process, we are explicitly drawing attention to the active role that the researcher is playing in deciding what, from the full universe of possibilities, makes it into our data basket and becomes part of our later analytic considerations. However, by using that linguistic reference, we are also setting up something of a dilemma for the researcher, since the point of empirical research is not simply giving license to picking and choosing among available information to bolster a particular bias or preconceived opinion. We leave that for the journalist! Interpretive description provides us with a rationale for continually reflecting on the meaning of sitting in that philosophical position somewhere in the middle. It looks something like this: I believe there may be something out there of common human subjective experience that can be known, and if I am to credibly uncover it, then the role that I will play in coming to know it is one for which I must be held highly accountable. It is this impeccable and meticulous accounting for one’s intellectual processes through the data construction process that creates the foundation

on which “constructions” will eventually make the successful transformation from initial fabrications into meaningful and accurate “findings.”

In this chapter, then, we’ll explore in more detail the mechanics of data construction and begin to consider some of the challenges that lie in store as you embark on your journey. Using some of the common data collection techniques as a basis for reflecting on data construction in general, we’ll focus on some of the pitfalls you might want to avoid and the motivations you’ll want to maintain as the data construction process evolves. Because each study has its own unique elements, and explicit prescription is counterproductive to an inductive reasoning process, what you’ll find here is an illustration of interpretive description logic in action within these various study design contexts. In each instance, the guidance offered will be aligned with certain kinds of research questions, in the knowledge that, by continuing to refer back to your own question, you’ll be able to assure yourself that your own logical reasoning about the data collection/construction process remains solid.

### **Options for Data Collection**

Data collection in interpretive description can take many forms and in fact the possibilities are infinite for creative researchers. Since subjective material tends to be fairly foundational to the kinds of questions that qualitative health researchers tend to ask, the goal in your data collection will be figuring out an appropriate and defensible means by which to get as close to that subjective experience as you reasonably can to increase the probability that you can access the kind of material that will allow you to answer your research question. The logic of deciding what your data source will be follows largely from a critically reflective consideration of what’s available to you, what the nature of that available information will likely be (for example, its strengths and limitations), and how much credibility it will offer as a reasonable foundation for any findings you might derive from it. So, for example, if you are considering using internet arthritis patient chat rooms as your source of data, you would be obliged to account for who it is they represent in this instance and the basis upon which you understand them to reflect anything beyond the unique set of internet users who happen to have signed on to this specific site at that particular time. Under some circumstances, such sources could produce marvelous data, and under other circumstances they would be entirely meaningless. A solidly articulated logic, starting from the justification of your research question, continuing through to the design you set forth for answering it, with an enduring awareness of the intended audience you believe will benefit from the ultimate knowledge you generate, will help ensure your eventual reader’s assessment that your “findings” reflect knowledge and not nonsense.

All forms of qualitative data collection involve some particularities regarding what it is that they will surface and what they might actually render invisible. Some are more obviously shaped by the researcher-subject interaction and context than are others, and some are more explicit than others in bringing the researcher's interpretive mind into the ongoing process of data collection. It is imperative that you try to fully appreciate the implications of the data collection strategy you are considering so you can understand and acknowledge its expected strengths and limitations from the outset. For example, if you are considering using art interpretation within your data collection approach, you'll want to ensure that you have a solid foundation not only in understanding what proponents of that approach have written in its favor but also what concerns have been leveled against it by its critics. Using an approach that inherently implies a highly subjective interpretation, such as an artistic representation of the phenomenon you are studying, may offer you a distinct angle of vision on it or, conversely, it may lead you to findings that would speak more clearly to an art appreciation audience than they would to your intended audience of health care professionals, who would have no common *disciplinary* basis upon which to understand art interpretations as a knowledge form. In such a situation, for example, rather than using art as your primary data collection mode, you might consider whether it might be more usefully applied as one complementary technique within your overall strategy to try to prompt different ways of revealing the kind of subjective material that is difficult to put into words.

Regardless of the data collection technique, it is essential that you inform yourself fully about its implications—not simply “the doing” but also understanding the form of the data that may become available to you, the implications of analyzing and interpreting it, and the credibility that the data source will have for your eventual target audience. While using a wild and wonderful data collection strategy might sound like a lot of fun, you always need to keep your eye on your purpose for the study in the first place, and techniques that can be readily understood by members of the discipline are a reasonable place to start. Here we will take a deeper dive into the implications of some of the more popular data forms to illustrate the kind of critical lens that you will want to apply to whatever data collection method you have chosen to ensure that it serves your intended purpose.

### *Interviewing*

Much of what was addressed in the previous chapter pertains to the individual interview context and provides a basis upon which some of the challenges of interviews can be considered. Here, we'll address more explicitly the strengths and limitations of the individual interview as a primary data source and some of the more common issues that arise in the conduct of data collection using interviewing.

### *Understanding Strengths and Weaknesses*

Interviews with individuals who have first-hand knowledge of a phenomenon have been the mainstay of qualitative health research for several decades. Because health practitioners agree that there are aspects of any health or illness experience known only to the person going through it, they universally accept that “talking to the patient” (and/or family) is an essential element in providing good health care. Also, because time and focus to permit “in-depth” talking is rarely an option within a busy health care practice, the kinds of questions that qualitative health researchers often ask are those that are triggered by the curiosity of what the answers might have been if they had the luxury of more “talking time” with patients in similar circumstances. Thus, the instinct for many applied researchers is that individual interviews make good sense as the first choice of data collection strategies.

Interviews are relatively easy to engineer and explain, and there is a wide body of available knowledge on how to conduct them effectively, both inside and outside of the applied qualitative research context (e.g., Berner-Rodoreda et al., 2020; Brinkman & Kvale, 2015; Hutchinson & Wilson, 1994; Miller & Crabtree, 1999b; Olson, 2011; Patton, 2002; Roulston & Choi, 2018; Rubin & Rubin, 2012). Guidance on interviewing is usually relatively straightforward to obtain, since colleagues may well have experience with the approach to data collection, and interviewing feels familiar and comfortable to most health professionals and members of other applied disciplines. For these reasons, it has been argued that there is an overabundance of qualitative health knowledge derived from the individual “conversational” interview, and that a more informed analysis of the implications of that bias is needed (Nunkoosing, 2005; Silverman, 1998).

As pain researchers have long since discovered, it is difficult to fully reconcile the relationship between subjective and objective knowledge. In recognition that pain relief was not optimally provided on a widespread basis, some researchers have actively advocated for an entirely subjectively based reference point (such as the widely used definition, attributed to Margo McCaffery: “Pain is whatever the experiencing person says it is, existing whenever the experiencing person says it does”) (McCaffery & Beebe, 1989, p. 7). While we can all intuitively appreciate how useful this claim is in relation to our own pain and would want our own health care providers to take our word for it rather than misinterpreting our stoic behavioral response to discomfort as less worthy of attention than that of the person who complains loudly, we also fully recognize that the subjective definition is highly vulnerable to manipulation if, for example, one wanted to obtain narcotic drugs for purposes other than pain relief. The pain example clearly illustrates the problem with the “either/or” position on subjective and objective knowledge in relation to these complex human issues. And it is this complexity that underlies an important limitation to interviews that

must be strongly acknowledged if an interpretive description study is to remain true to its purpose.

Talking is one of our better and more accessible mechanisms for gaining access to that material we call subjective knowledge. At the same time, we all know that there are many human subjective experiences that are inarticulable, or that words cannot effectively convey. Further, we are well aware that “what” we talk about and “how” we talk about it are highly influenced by our temporal, spatial, social, and cultural locations (individually and intersectionally), and therefore easily recognizable as a form of social construction. For example, while a relationship between humans and nature has always existed, language with which to discuss it was largely confined to the realm of distinguishing natural from supernatural forces over much of recorded history. In more recent generations, we learned to talk about “the environment” as a distinct conceptual entity. And while that concept might have been difficult for our great-grandparents to get their heads around, it slips easily and meaningfully into the common discourse today, even among small children who now easily engage with it from an early age and throughout their formative

### **BOX 7.1 TOWARD ESSENTIAL MEDICINES**

Coherent recommendations about which medicines should be deemed “essential” according to the World Health Organization definition, including meeting priority population public health/disease prevalence needs, being efficacious, safe, and cost-effective, and being readily available, are essential to health system planning. This large international team of researchers sought to identify the considerations that should be addressed in determining whether to add, maintain, or remove a medicine from an essential medicines list and thereby improve organizational processes to support evidence-based health decision-making more broadly. Interviewing key informant stakeholders working at national and global levels across all WHO regions, this team identified opportunities for facilitating an evidence pipeline between national guidelines and global essential medicines lists, expanding opportunities for improvements in health through universal access to evidence-based treatments.

Piggott, T., Moja, L., Akl, E. A., Lavis, J. N., Cooke, G., Kredo, T., Hogerzeil, H. V., Huttner, B., Alonso-Coello, P., & Schünemann, H. (2023). Decision criteria for selecting essential medicines and their connection to guidelines: An interpretive descriptive qualitative interview study. *Journal of Clinical Epidemiology*, *154*, 146–155. <https://doi.org/10.1016/j.jclinepi.2022.12.007>

years. More recently, ideas about the delicate relationship between humans and nature have been reframed as “climate change,” “global warming,” or the “climate crisis.” As society shifts and unfolds over time, we gain access to an evolving shared terminology that allows for increasing complexities and refinements in how we communicate about such ideas and the new layers of meaning we can attach to our language choices. We are not simply modifying our terminology; we are actually thinking differently.

In the communicative context, therefore, it becomes important to remember that people are far more likely to reference conceptualizations that are familiar to them than to try to construct new ones. This means that those we interview are less inclined to struggle to find language that precisely and fully articulates the complexity of their experience than they are to use conceptual terminology that will direct our attention toward what they think we will understand. For example, once concepts previously owned by the professional sector, such as “family dysfunction” or “codependence,” come into the public lexicon through the filter of TV talk shows, they can become accepted conceptualizations with which individuals start to make sense of and talk about the confusing set of thoughts and feelings they may have always sensed but never articulated with respect to their own web of interrelationships. What we can verbalize begins to shape what have the ability to think about in more depth.

Because discourse is so intertwined with the dynamics of human social experience, it is quite easy for a qualitative health research interviewer to capture findings that, in effect, reflect simply the popular thinking of the times rather than something more deep, profound, or substantial about human experience. While documenting the kinds of temporal and contextual understandings that can be gleaned from discourse can be quite useful (such as keeping track of the evolving language signifiers with which youth are linguistically referencing their feelings of alienation), it is essential that we not confuse it with the kinds of “subjective truths” that are thought to be independent of context and foundational to human experience. Qualitative researchers who rely heavily on interviews, therefore, must retain some philosophic humility about what it is they are uncovering and accept that they have an obligation to account for the particular relationship to time and place that their findings reflect. And this becomes one important reason for restraint in generalization, both in the doing of the research and in the reporting of the implications of your eventual findings.

### *Enhancing Quality*

If we engage in interviews with a strong consciousness of what has been told to us, on the basis of what conditions and prompts we have created for the

interview, and with a thoughtful awareness of the broader social ideational context within which those interviews are conducted, we can certainly obtain a species of subjective knowledge that has relevance and importance for practice application. In general, however, high-quality data will not simply be a product of posing questions and documenting responses. Rather, it will derive from a carefully thought-out frame of reference, attitude, and communication style designed to build rapport (without stepping over the boundaries into friendship or therapy!), to elicit depth of detail and clarification of threads within the account, and to foster elaboration, clarification, and even correction of your initial understandings and interpretations. It requires a substantial dose of humility and reflexivity to ensure that the dominant aspects of your own personality and passion don't steer the interactions in predictable directions. In essence, you are an encouraging and judgmentally neutral facilitator so that individuals can explain themselves as fully as possible. Despite your years of professional practice expertise and the months you may have spent reviewing the literature, you are entering the interview as a curious learner—confident that what really matters will be that which you are going to learn from the opportunity to engage in this interview. As your research progresses, you will find it natural and appropriate to effect more conceptual linkages between ideas within the various accounts you are collecting and the larger context of what you are learning and thinking. However, the core of what you are seeking is contained somewhere within what is articulable and shareable by the individual in their own context, way, and time.

Some practical matters associated with high-quality interviews are well worth further mention. It goes without saying that you test your recording equipment in advance and are sufficiently comfortable with it to put the person you are interviewing at ease. Especially when they are conducted in people's homes, interviews are prone to unexpected interruptions and transitions, so be prepared to accommodate whatever happens with grace and respectfulness. For example, most people simply must start their stories at the beginning, and you may well find that there is considerable introductory and background information that needs to be shared before your more focused interview questions become appropriate. Try to avoid feeling impatient about this, as what you are hearing may well turn out to add value as you come to understand the phenomenon more deeply over time. Ensure that you have allowed sufficient time to be able to feel fully present with the interview for the time that it takes to unfold. Good preparatory management of all of your own possible personal distractions (did I remember to call the babysitter? am I going to miss my bus?) will allow you to ensure the attentiveness and conscious engagement that makes for good data. By all means, take notes if you need to, hopefully not detailed notes, but rather jotting down key points to which you want to remember to return later in the interview. If you do take notes in the moment, ensure that your primary focus remains on your study participants, on listening and really hearing, on prompting further

depth, and on expressing your curiosity and genuine interest in the expertise that they are offering. When it comes time to end the interview, do provide something of a summary of key ideas you have heard, and share with that person something of what it is that you will be taking away from the interview as you reflect further on the questions you are asking and integrate what you have learned from their interview with what you are hearing from others. If at all possible, build the option of repeat interviews or opportunities for confirmation follow-up conversations into your plan, so that your evolving interpretations can be informed by an increasing depth of clarifying questioning.

Interviews for the purpose of interpretive description will normally contain lots of contextual and background information of significance to your study participant that may not be entirely relevant to the intended purpose of answering your research question. The trick is to maintain a healthy respect for context, since you may not realize until much further along your analytic path that a particular contextual bit is in fact quite relevant in a way you might not have imagined at the outset. At the same time, it is also important not to confuse context with data. For example, if you are exploring the transition to parenthood in the context of international adoption, study participants may be highly sensitized to recent public press reports about the shortage of affordable and safe daycare in your local area and express anxieties about this issue during their interviews. Recognize that this does not mean that daycare worries overshadow the international adoption experience, but rather that your study participants want you to appreciate the relevance of immediate context. Ensure that you are always engaged in a critical reflection loop with regard to why certain ideas appear within your data set and what they might mean.

As was mentioned in Chapter 4, health professionals who interview regularly in the course of their practice often find it particularly difficult to shift into research-interview mode. They may find themselves feeling awkward and inhibited, and it may take time and practice to develop competence with a qualitative research style of interviewing. Another common experience is to find out that your interviews fall dramatically short of the rich, articulate, and powerful sharing of stories that you had anticipated hearing. Not all people who have an experience will have the interest or inclination to wax poetical about it, and sometimes human expression can seem mired in the mundane. However, rather than indulging your frustration because an interview participant seems not to be giving you “good data,” it is wise to keep focused on your curiosity about who this person is and why you are getting the data that is being offered. Sometimes the germ of a powerful new insight comes from the voices from which it is least expected.

### *Focus Groups*

Focus groups should never be thought of as convenient ways to conduct individual interviews efficiently but rather as strategic methods of capitalizing on what

we know about group process to generate certain kinds of social knowledge, such as the shared beliefs and attitudes that might underlie behavior patterns (Barbour, 2018; Flynn, Albrecht, & Scott, 2018; Liamputtong, 2011; Morgan, 1997; Morgan & Hoffman, 2018; Ongwuegbuzie et al., 2009). By understanding what they signify and what they are capable of yielding, you'll be able to judge when and how focus group data will enhance your inquiry as a primary or collateral method.

### *Understanding Strengths and Weaknesses*

With individual interviews, because you come away with a profound sense of unique and distinct stories, it can sometimes feel as if you are misrepresenting them when you try to summarize commonalities. With a focus group, you have the opportunity to meet distinct individuals, each with some experiential knowledge about a phenomenon, and see what happens when they engage in interaction with one another. Because the social dynamic of a focus group is the element that you are trying to facilitate, the method works best where your question is one with social dimensions to which each individual might contribute. For example, if you were curious about which model of support services might be best received by family caregivers of patients with a particular condition, you might structure a focus group that would capitalize on their analysis of the experience, observe a debate of the relative merits of the options, and ascertain whether your groups do or do not come to a comfortable consensus about the ingredients that constitute their preference decisions. The data you would be eliciting is therefore not so much a forced concession but an understanding of what kinds of people or circumstances various options would likely advantage or disadvantage and why. Thus, the focus group methodology allows you to go beyond "averaging" what individual contributions might suggest to exploit the creative potential of the variations you uncover and come to an understanding through the interaction among perspectives.

A risk with focus groups is that in the wrong hands they can quite easily obscure non-dominant perspectives and become something of a coercive data collection mechanism. Because they are inherently social, they privilege the kinds of data that people tend to feel more comfortable expressing in the social domain, such that material that is more private, stigmatized, diverse, or "politically incorrect" is unlikely to come to the surface. Because few applied researchers are posing questions for which the dominant public response is the only relevant one, focus group data must be considered with caution. In practice, for example, many health professional researchers strategize their focus group design so that it not only captures aspects of a phenomenon that may be common among the participants but also explicitly solicits and acknowledges the very real and important contribution that is made through the sharing of individual

differences. Thus, the focus group can create a context in which the individuals within it come to be informed about one another and can collectively capitalize on that broader base of understanding in helping you refine and develop the shared and particular meanings that will constitute your data.

### *Enhancing Quality*

Focus groups work best if they are not large (six to eight individuals might normally be considered an upper limit) and if they are carefully orchestrated. Confidentiality and respectfulness must be assured, and the researcher/facilitator is obliged to maintain a strong control over what transpires in order to protect all members. Excellent, broad-based, and more targeted questions greatly enhance the capacity of the group to “focus,” and a skilled group facilitator can create an environment in which group members genuinely address one another instead of sequentially speaking to the investigator. Effective leaders will also ensure a reasonable balance among participants in the competition for “air time,” drawing out those who are more reticent and skillfully guiding those who are more verbose. Because voices can be difficult to distinguish on audio recordings, many researchers choose to have an observer/note taker to track the dialogue and identify who says what. Such field note support frees the facilitator to engage fully in steering the dialogue through the various elements you have planned for and toward a productive conclusion. In team-based research, you have the opportunity to identify who within the team would be best positioned to facilitate, and another member can record observations and reflections. And, given the creativity stimulated by the global COVID pandemic, we now see a growing body of literature on online formats for focus groups, as well as the use of other electronic formats such as text-based chat forums, beginning to develop (Colom, 2022; Samardzic et al., 2023).

If focus groups are to be your data source, careful reflection on their nature and constitution is especially important, and a thorough accounting for these will become a major component of your credibility platform. In particular, it is essential to remain mindful of the many ways in which the social dynamic of the group may have shaped the thinking of its individual members or their choices as to which of their ideas to share and which to conceal. Demonstrating critical reflection on these matters will be essential to ensure that the findings you come up with on the basis of your analysis remain true to that reactivity and honor the relevant variation.

### *Participant Observation*

In contrast to the interview, which seeks to gain close access to the language cues that help expose subjective experience, and the focus group, which seeks to

**BOX 7.2 WHEN PETS CAN MAKE THE DIFFERENCE**

Palliative care social workers in the USA recognized that, for many persons experiencing homelessness who are seriously ill or at the end of life, animal companions provide relief from their feelings of social isolation and loneliness. They therefore sought to describe the impact of the animal-human relationship on the health events of such individuals. What they learned is that, while a relationship with a pet animal can provide many healing benefits in this context, including a reason to live, homeless pet owners with serious illness can also face the painful paradox of having to give it up in order to stay alive. The findings from this study allowed the researchers to propose more nuanced clinical assessment and programming as well as practical implications for service expansion for all persons with animal companions.

Ward, C., Johnson, I., Bamwine, P., & Light, M. (2024). The pet paradox: Uncovering the role of animal companions during the serious health events of people experiencing homelessness. *Anthrozoös*, 37(2), 343–359. <https://doi.org/10.1080/08927936.2023.2280376>

exploit the social constructions within which we experience our subjectivities, observation provides a platform from which to reflect upon behavior as it plays out in its natural context (Bogdevic, 1999; Lofland et al., 2006; Patton, 2002). While non-participant observation is a well-established method in the social sciences (Ciesielska et al., 2018), and video-based observation is beginning to be taken up in such fields as health research (Golembiewski et al., 2023), the more dominant form of observation that has been used across health research in particular is more accurately depicted as involving some level of participation within the world the researcher is seeking to understand. As such, it too has dimensions that must be well understood for observation to become a credible source of interpretive description data (Friberg & Öhlen, 2010; Mays & Pope, 1995; Mulhall, 2003).

*Understanding Strengths and Weaknesses*

Observation offers the distinct advantage of allowing you to sidestep the powerful filtering effects of language and social discourse. Just as none of us is capable of seeing ourselves exactly as we seem to others, direct subjective expression is well understood to obscure certain taken-for-granted elements of the meaningful world. Thus, being able to stand back somewhat from the self-consciousness with which individuals articulate their realities permits a researcher to pose different sets of questions pertaining to what people seem to be doing rather than what they consciously think they are doing and can articulate in spoken form.

As a strategy for gaining contextual understanding of the world within which subjective and social experience exist, observation can be a marvelous adjunct to your study or a data collection strategy all on its own.

A major weakness of observation is that you can't really know what aspects of the context are as taken for granted by you as they are for the actors within the setting. Thus, it can be challenging to sort out what it is that you are or are not observing and why. Unless you are concurrently obtaining other forms of data that would allow you to access perceptions, observation only reveals what is being done and not why it is being done in that manner. What conventional ethnographers understood about observation was that it was best accomplished with some clarity as to the levels of analysis that were being employed. Thus, the most comprehensive observational studies are those that explicitly recognize both distinctions between and interrelationships among micro-, meso-, and macro levels of activity.

### *Enhancing Quality*

A well-known problem with observation is its reactivity, in that by observing something, you bring it to the attention of those who exist within it in some manner that may not have been accessible before your arrival. Further, researchers unfortunately do sometimes forget that they are not the primary actors within the original setting, and their own subjective experiences in the conduct of research are not equivalent to those of the primary actors. Thus, various forms of blurring of roles and positions are something that observers do need to attend to throughout their studies (Lowe, Riggs, & Jenson, 2011; Tullis, 2013; Wind, 2008).

In order to conduct observation as effectively as possible, you'll need clear understandings as to the boundaries and scope of your study and an ongoing process for feedback as to the effect you are having upon the setting. You may well find that periods of immersion and distance are essential both to maintain the equilibrium of the setting and to permit you to move between analytic levels. Meticulous documentation and recording are essential, and observational studies tend to rely heavily on reflective field notes to track the evolving logic that is shaping that which enters and exits your window of concern.

### *New and Emerging Variations*

While interviewing, focus groups, and participant observation have well-established traditions, and clear guidance is available in the literature to advise you on how to anticipate and manage the predictable challenges, the available options for data gathering in interpretive description are rapidly evolving. A few comments about how to approach these newer and emerging options may help inform your decisions about the implications of taking them up within your

study and the kinds of safeguards you might put into place when integrating newer *Variations on a Theme*.

Some of the evolving methodologies you may encounter reflect evolutions within the conventional approaches. For example, within the interviewing tradition, you may consider moving beyond individual interviews and considering dyads, triads, or other groups (Morgan et al., 2013; Polak & Green, 2015). These differ from focus groups in that their motivation is not necessarily to capitalize on interaction but to allow for multiple interested parties within a phenomenon to weigh in. The patient and family caregiver combined interview in health care is a case in point. Interviewing them together ensures that you are not leaving out either voice; however, it does require that you consider what influence the caregiver's presence may have had on the patient's freedom to be completely frank about all aspects of the caregiving support.

Other modifications on the conventional interview involve developments beyond the traditional face-to-face interview or focus group format. Although such techniques certainly pre-existed the global COVID pandemic conditions beginning in early 2020, necessity became the mother of invention in this regard. Beyond low-contact options such as interviewing individuals or groups via telephone (Hanna, 2012; Trier-Bieniek, 2012) or using email diaries for data collection (Jones & Woolley, 2015), there is now widespread recognition that, in many applied fields and contexts, qualitative interviews or focus groups of equivalent, or in some instances even better quality, can be conducted via virtual formats (Carter et al., 2021; Dos Santos Marques et al., 2021).

Researchers are also moving beyond overreliance on verbal prompts to bring in other kinds of materials, such as visual images or auditory stimuli, to encourage different and more expressive data. Photo-elicitation (or photovoice) as a means to prompt different kinds of contextual and explanatory accounts prompted by reflections on photographs has attracted particular popularity in the health research field (Glegg, 2019). Researchers have used these visual tools to capture aspects of their experience that are difficult to convey in language, often using them as a prompt to deepen interview material (Kantrowitz-Gordon & Vandermause, 2016; Nykiforuk, Vallianatos, & Nieuwendyk, 2011). Such approaches have been particularly appealing to researchers working with children and other populations where verbal communication presents known limitations to accessing elaborative material (Lindhout, Teunissen, & Visse, 2020; Teachman & Gibson, 2013).

As these variants evolve, researchers are learning more and more about their strengths and limitations and pressing for thoughtful consideration of the conditions under which they can appropriately and responsibly be deployed (OliFFE et al., 2023). For example, there has been considerable debate in the qualitative research literature on the pros and cons of virtual focus groups. Here, you are sacrificing the depth and authenticity of direct interaction within the social

dynamic of an in-person meeting format for the possible advantages of being able to recruit those who might be difficult to reach by virtue of time, money, or mobility, as well as the increased spontaneity that anonymity can provide (Murgado-Armenteros, Torres-Ruiz, & Vega-Zamora, 2012). However, even the most enthusiastic proponents of this approach also caution researchers against the many potential disadvantages with respect to the quality and nature of data as well as the heightened opportunity for misrepresentation (Roberts, Pavlakis, & Richards, 2021).

With respect to observational studies, earlier in this chapter we considered the participant observation variety as the approach most frequently taken up by applied researchers. However, it is important to acknowledge that there are also various evolving forms, including covert (or deceptive) observation, which may be applicable in the context of studies in which the known presence of the researcher would preclude the phenomenon under study from being enacted or change it inalterably. Clearly there are extensive challenges and potential controversies associated with the use of these approaches, including major ethical complications that would have to be resolved, and the researcher considering this kind of data collection strategy would do well to pay heed to the many cautions articulated in the literature (Gorup,

### **BOX 7.3 DRAWING AND TELLING**

Researchers in Ireland wondered whether introducing drawings into applied qualitative investigations with adolescents might help overcome some of the well-known challenges associated with eliciting interview responses from this population. In a study of how adolescents viewed their mental health services, they found that reference to drawings the adolescents had produced broke down some of those traditional barriers and helped facilitate a deep level of self-reflection. With respect to mental health services they had used, it allowed these adolescents to effectively illuminate gaps in knowledge, confusions, and preconceptions that might not have otherwise surfaced in a conventional interview data collection context. Recognizing that drawings should not be used casually and must be philosophically compatible with study design, these researchers encourage expanding the evidentiary basis for when and how such techniques can be meaningfully deployed.

Goodwin, J., Savage, E., & O'Donovan, A. (2023). Using the draw and tell method with adolescents as part of an interpretive descriptive study. *Qualitative Research Journal*, 23(3), 273–286. <https://doi.org/10.1108/QRJ-08-2022-0105>

2020; Walters & Godbold, 2014). Another increasingly popular advancement on conventional participant observation, especially in community-based research, is the go-along (also known as walk along, be along etc.) approach (Duedahl & Stilling Blichfeldt, 2020). Here the researcher is not merely participating in a designated setting but rather following study participants as they go about daily business throughout a neighborhood, for example, drawing on prompts from the physical or social environment to solicit storytelling and recollection along the way. Although such approaches significantly expand the locational scope of a study, they can also pose additional complexities associated with such issues as informed consent, confidentiality, relational boundaries, and safety.

### *Novel Modalities*

In addition to these recognizable modifications of conventional qualitative research form, the applied qualitative research literature in recent years reveals an evolving enthusiasm among scholars for pushing at the edges beyond what the standard approaches can yield and exploring newer modalities of soliciting, formatting, and interpreting data. Prominent among these are arts-based methodologies, including a wide range of options, including narrative, poetry, music, performance, dance, or movement, and visual arts (Leavy, 2020). While there is an obvious appeal in capitalizing upon such creative expressive forms as poetry or drawing in order to elicit deeper or different kinds of material than would be forthcoming in conversational form, and the products from such research may reach a broader audience than one can envision from conventional written research reports or presentations, there are also drawbacks to these kinds of data collection methods that are worth considering in advance of making a commitment. Arts-based research approaches are posing new and different challenges within the scholarly and scientific world in terms of what these data represent and with respect to what interpretations one can draw from them. Further, at this point in our methodological evolution, there are still many gaps in how such research will be judged (Boydell et al., 2016).

Another rapidly increasing data collection form is electronic message boards, including public domain internet material such as chatrooms and discussion forums on an infinite range of topics (Schiek & Ullrich, 2019). The proposed advantage of this data format is that you can observe what people are voluntarily telling one another in a naturally occurring dialogue (albeit artificial in some other senses) uncontaminated by the interference of a researcher. Proponents of this approach note that you can reach a far broader sample than that to which the average researcher would have direct access and in a timely and inexpensive manner (Holmes, 2009). Further, by virtue of choosing their own level of

anonymity, participants may be more openly expressive within the internet space than they might be in their authentic lives to share detailed information about such delicate issues as the day-to-day bodily experiences of illness (Seale et al., 2010). However, responsible scholarly use of internet data is also the subject of considerable debate within the literature, and a number of worrisome practical and ethical issues have surfaced (Bond et al., 2013; Markham & Buchanan, 2012; McKee & Porter, 2009; Yuchao, Ying, & Liao, 2021). The nature of researcher obligations with respect to the privacy rights of online discussion participants is a murky area, and the normal rights of research participants to withdraw from a study seem unmanageable. Further, data quality is fraught with complexities, as there is no way to manage the false representations that are known to be a significant part of the internet environment.

If you are considering a novel or relatively untested data collection approach, you would do well to investigate and critically reflect on its possible strengths and weaknesses prior to embarking on your study so that you can take strategic steps to ensure that you attend to quality and credibility. Be cautious of adopting a “flavor of the month” approach; while it may seem to be the newest and most exciting option when you begin, by the time you complete your study, it may have become *passé*. Pay careful attention to the emerging cautions and debates in recent literature. Those who have run into difficulties or been disappointed by results can sometimes be much better sources of authentic advice than those who uncritically advance new options.

Although there are no limits on the possible data sources and data collection methods one could consider with interpretive description, it is always important to ensure that the approach you select aligns well with your research question and your ultimate disciplinary knowledge objectives. Consider the potential impact of the approach you choose on who might be more or less amenable to being recruited into your study, which aspects of the phenomenon your approach will uncover, and which they might obscure. Be mindful of your potential audiences for the finished product, including the kinds of journals you might wish to publish in or the conferences at which you would want to present. And do try to be realistic in estimating the eventual reach of your research message, as it will be shaped by the choices you make. Not every research topic warrants a public art exhibition or poetry reading as its endpoint!

As is evident from these very brief comments, every data source and method of data collection has its advantages and drawbacks, and the researcher must be well aware of these in order to ensure that the logic of the study remains intact from the outset and through to the final conclusions. Recognizing this, many researchers consider triangulation of multiple data collection approaches to be a viable option within an interpretive description study. Adding an element of participant observation can help remind you that there may be multiple perspectives on an issue, rather than just the subjective one your interview study is focusing

on. Similarly, interviewing a few key informants for elements of meaning and context might help you reduce the possibility of misinterpreting what you see in your observations. And bringing together a focus group of individuals with whom you have had a series of individual interviews to stimulate their interpretation of commonalities and differences can powerfully refine your grasp of the shared nature of the phenomenon you are studying. In some instances, you will consider one source of data primary and the others more collateral, and in others you may design a study from the outset as explicitly capitalizing on the distinct angles of vision supported by different data collection strategies.

Regardless of your data collection method(s), your understanding of interpretive description will provide considerable guidance in how you work with and apply the principles that derive from the in-depth data collection resources to which you have access. Your applied orientation will help you retain a focus on what meaningfully becomes data and the complexities associated with decisions as to what you are looking for and how to find it. You understand that your position within the data field is one of description (with as much depth and richness as possible) and interpretation (in the sense of an ongoing reflection about what these data might mean). That methodological direction will also steer you away from predicting or projecting, leaping to premature conclusions, or “explaining” in the sense of generating theory. Rather, your understanding of the needs of the applied practice world, as framed in your original research question, will help keep you on a decisional path that ensures the integrity of the data you construct and the credibility of the conclusions you make on the basis of it.

### **Managing the Collection**

Regardless of your data collection approach, you will need an explicit plan for how you are going to manage your data (Antonio et al., 2020; Bazeley, 2013; Easton, McComish, & Greenberg, 2000; Gibbs, 2007). Data management has to do with tracking, organizing, and sorting what you bring from the field and ensuring that it takes the form of material that you will be able to access and use throughout your data collection and analytic processes.

### ***Transcribing and Translating Data***

If your data set is in the form of audio recordings, it will normally require transformation into text in order to effectively manage it and proceed with analysis. The imperative of “verbatim transcription” derived from the social sciences, in which a meticulous rendering of utterances (sounds, words, pauses, etc.) into text signifiers was seen as essential to the reader being able to “hear” voices of the other (Davidson, 2009). Today, although the term is widely used in qualitative research reporting, it is rare to include an explanation of what was actually

done, and there is likely a wide variation in the actual application of the idea (Inoue, 2018). As transcription services (human or artificial intelligence) are now readily available, and since the work is quite arduous, most qualitative researchers no longer do their own primary transcription work. However, if you are a new researcher doing a smaller study, there can be no better way to deeply immerse yourself in your data set and slow down your reflective and interpretive processes to catch every nuance than spending several hours working on each transcript. It slows and focuses attention on the nuances, words, phrases, and pauses, and allows you to hear more deeply what the language contains (Bailey, 2008) and shifts the pace of attention that characterizes so much of our scholarly reading and reflection. It can be amazing what more you can hear when you focus on words and sounds and silent spaces rather than simply on storyline.

Applied research tends not to be overly concerned with the intricacies of audible material at a level of minute detail, and it is the meanings contained in phrases and sentences most of us are after. Therefore, as an alternative to verbatim transcription of the whole (which can be time consuming and expensive, and always requires careful checking and correcting for the difference between what a transcriber hears and what you know the speaker meant), it can be appropriate in the case of some applied studies to consider using a combination of selective transcription (those aspects of a full interview that pertain to the issues under investigation) and “fair notes” (or notes made on the basis of careful listening to the material) (Hill et al., 2022). As analysis progresses, one can always return to deep listening of those segments in which key insights may be further explored.

Whether you do your own transcription or take advantage of the services of someone else, it is important to be aware that transcribing can itself become a powerful and emotionally complex experience. Especially if your data contain sensitive or emotional material or pertain to painful human experiences, you will want to safeguard your transcriptionist against the risk of secondary traumatic stress (Kiyimba & O’Reilly, 2016). Although the interview may have been difficult for you to conduct, you entered it well armed for what you were likely to encounter and exerted some control over what ensued; being situated in the more passive “onlooker” role of a transcriptionist in relation to sensitive material can be even more distressing.

Translated material presents additional challenges that require decisions with respect to data management. The usual convention has been that careful and thorough translation and back translation by persons expert in both (or all) languages is an essential component of all studies using translated material to ensure that translated material not only reflects study participants’ words but also contextual meanings (Yunus et al., 2022). And while this represents an ideal case, it also places an extraordinary burden of effort on the researcher seeking to add to the body of applied knowledge by including, rather than

excluding, language variance. Obviously, there will need to be thought given to the differences between working with material in which you have no knowledge of the language and working across multiple languages with which you have familiarity. For the multilingual researcher (or team), the key will be to ensure careful consideration of what makes sense in terms of the degree to which language and meaning nuances matter in the various steps forward into data management and analysis. We know, for example, that despite ubiquitous expectations that researchers claim both translation and back translation of the whole of their data sets, that same level of expectation is not placed on authors who have conducted research in their own language but are then publishing it (with “verbatim quotations” included) in a second language. So, in keeping with the pragmatics of inquiry in the applied fields, it seems quite reasonable for researchers to make transcription and translation decisions that align with the nature of their study question, their data set, and the knowledge needs of the intended audience.

### *Protecting Data*

Field notes and transcriptions of audio-recorded data tend to be the mainstay of interpretive description, although the principles of managing them would apply equally to collateral sources such as videotapes, photographs, or documents. First, you must scrupulously attend to the specific requirements of your ethics board with respect to such matters as identification and protection of confidentiality and anonymity (Saunders, Kitzinger, & Kitzinger, 2015). Identifying information typically includes names and contact information but may also, in some studies, include other material that could identify unique individuals, such as those that might have a rare disease or circumstance (Kaiser, 2009). Further, data tend to be messy in the sense of including lots of other potentially identifiable material (the name of the surgeon who did the procedure, the name of an institution where care was provided), and it is useful at the outset to clean these from notes and transcripts and replace them with more generic identifiers such as “[surgeon]” or “[clinic].” Original notes and recordings that do contain these identifiers should be carefully stored in a secure place (usually an institutional server) and separated from the sanitized copies that you will use for your own ongoing reference and analysis.

Beyond these fundamental protections, also ensure that any clerical support people who might have access to original material have committed to confidentiality (a signed agreement is advisable) and that mechanisms for sharing data among research team members or supervisors do not expose the data to going astray or being misused. Consider password-protected files and other means to ensure that access is tightly controlled and copies are not circulating out there in the internet stratosphere.

## **Organizing Data**

Qualitative data have a tendency to multiply exponentially, and many researchers find themselves quickly overwhelmed with volumes of information. Thus, it is important to plan for how you will manage and organize data, how you will track your transcription, filing, and coding sequences, and how you will ensure both security and ease of retrieval (Antonio et al., 2020). Some researchers feel a tendency to try to break down, summarize, and synthesize very quickly and may need reminders to ensure that the contextual whole is preserved for ongoing analysis. If you too quickly extract only those key ingredients that you think will be relevant, you are likely thwarting your ability to move beyond where you first began. Other researchers will find just the opposite. By wanting to preserve and honor the integrity of the whole, they may find themselves incapable of sorting and organizing any of it into pieces. It seems best to try to discover which kind of person you are likely to be in this circumstance and then create an explicit plan to overcome the potential limitations of your inclinations in this regard.

A marvelous adjunct to the data management process is the readily available assortment of qualitative research software. Such programs create various processes whereby data are entered into a digital format that is highly amenable to organization and sorting and, ideally, reorganization and resorting as your emerging analytic insights become apparent (Paulus, Lester, & Dempster, 2014; Richards, 2021). Despite the enthusiastic claims of some of the manufacturers, however, you must always remember that such systems do not and cannot conduct inductive analysis. What they are good for is putting data into groupings and structures that will remove some of the “grunt work” associated with conventional manual sorting and organizing and provide you with access to that data in formats and reports that can facilitate the inductive analytic mental processes by which you work with your data. Because the volume of data in any applied qualitative study is likely to be extensive and the meticulous attention required to “code” it is notoriously exhausting, many newer researchers find it easy to get bogged down in the detail such that they cannot rise above the minutiae sufficiently to actually analyze its patterns. So, the main principle involved in working with any data management system is to ensure that it works to support your analytic process and is not a replacement for it. If it is so overly complex, time-consuming, or structured that you can’t step back and think about data, then it may be detrimental to your aims (Taylor, 2013). Until you are well familiar with the interaction between software programs and your own particular analytic and conceptual style, it is worth exercising caution.

Although reliance on software is rapidly becoming the norm for data management, do consider the possibilities inherent in basic word-processing programs, especially if you are a newer researcher conducting a smaller study. Just as different people are characteristically more linear or lateral in their thinking,

researchers will find that they have certain kinds of analytic preferences when confronted with an evolving and growing body of fascinating material. Until you know your own style well and can effectively match it with the capacities of a software-processing system, experimentation with paper and pencil, basic on-screen highlighting and filing techniques, or even wall-chart graphics can help ensure that your inductive reasoning ability isn't overwhelmed by the orientation and directionality that each software program favors and you remain in control of your data construction process.

### *Tracking Constructions*

Although we will have the opportunity to engage more deeply in considerations of data analysis in the next chapter, the interpretive description method implies that you are engaging in both processes concurrently and that your ongoing analytic processes will be informing your subsequent data collection and construction. Because of this, an important element in managing your data is carefully documenting what has been gathered and thought about and finding ways to track the evolution of each within your process over time. Some researchers refer to an "audit trail" as a feature of your eventual research report that will be requisite to the credibility of your findings. This means that you have provided your eventual audience with sufficient information about the decisional processes you made along the way to be able to recreate the logical reasoning that explains why your data exist in the way that they do and the manner in which your analytic processes have taken on their eventual shape and texture.

The hard work of data analysis relies on the intellectual practices associated with seeing possible relationships among pieces of data you are gathering and then considering the manner in which these relationships play out (or don't) across the growing and evolving wider data set. It isn't a passive process, as you will be required to actively solicit further examples, variations, and contrasts in order to eventually conclude what possible patterns or themes exist within your data set and may have relevance in relation to your original research question. However, when we actively engage in this kind of inductive reasoning process, many of us tend not to be overly disciplined about it. Some of us leap quickly toward what we assume to be true and become invested in that answer a bit too quickly; conversely, others become overly paralyzed with the insecurity of articulating any linkage between possibilities when we don't yet have a complete data set. The former kind of researcher will need to learn to slow down, document, and reflect on the decisional points along the way, and the latter will need to use reflective documentation to create a safe space for trying out various conceptualizations. In either instance, careful reflexive journaling or note-taking of some kind will be essential to being able to ask yourself later on, "how is it that I came to that understanding?" and to produce a reasonable and defensible

answer (Phillippi & Lauderdale, 2018). This self-awareness of your evolving insights will eventually be reflected in the subtle language and syntax choices you make in writing up your findings and representing your conclusions. So, an audit trail for your reasoning becomes an essential ingredient of the research enterprise.

By engaging with data, you enter into a creative discovery process whose outcome remains somewhat tentative until you suddenly discover that you have arrived. You engineer a set of exposures whereby you have access to certain kinds of information about the phenomenon in which you are interested and create a sequence of steps and activities that provoke your thinking mind to explore, question, seek, and tentatively interpret. Engaging with data in relation to a phenomenon about which you are concerned enough to have engaged in a qualitative study can be a powerful and thoroughly satisfying experience when well planned and executed. For many of us, it becomes a luxury not easily afforded to the majority in the professional practice world. And from this engagement, if you don't rush it too quickly and keep your eye on the eventual prize, you are creating the foundation for meaningfully relevant new applied knowledge.

# 8

## WORKING WITH DATA

### Finding Pattern among the Pieces

Building new constructions from the data you generate in your study is unquestionably the most painfully difficult and yet the most essential element in what constitutes a credible interpretive description. Although it is relatively straightforward to delineate the attributes that characterize a fundamentally flawed logic or an entirely superficial product, the qualities that will distinguish an elegant and convincing analytic process from one that is more mediocre are much more difficult to pinpoint with the kind of precision that would help you know if you achieved it. While some of what might differentiate a brilliant from merely adequate analysis can be credited to the subjective response of the eventual audience, the expert researcher is one who knows how to make sense of data in a manner that does not simply defer credibility conclusions to the whim of the “theoretical reader,” but strategically engages that reader from the outset. What I mean by this is that the human mind, especially when stimulated by wonderful data, can make marvelous connections and associations.

Experienced applied qualitative scholars will have learned how to distinguish between the various kinds of delightful experiential “*Ahah* moments” that creative intellectual work produces so that they can consistently generate the kinds of research products that reflect a meaningful synthesis of new understanding and articulate it in a manner that speaks clearly to the intended audience. Rather than providing us with elaborate detail as to how it got there, the high-impact qualitative research report will tell a powerful “story.” I use that term advisedly, knowing that some may consider that term to imply fictional, and others

that it emphasizes a departure from empirical facts (Sheard, 2022). To me, it effectively captures that ideal blend between description and interpretation that is the essence of applied qualitative inquiry. And to arrive at that compellingly told story that offers needed interpretation to our applied audience, the researcher has to be able to build a coherent and solid line of inductive reasoning through ideas that may be complex and contradictory and make defensible arguments as to the directional choices that have been taken along the path. The detail of that analytic process doesn't become the story, but in the quality of the story, we will know the quality of the analytic work.

This distinction between what the brain instinctively does with data and how data analysis ought to be conducted and reported is an important element in perfecting the art of data analysis in any qualitative research approach. Here we'll make reference to the kinds of "cookbook" data analysis approaches that are available in some of the qualitative research literature, examine something of how such techniques might inform our thinking or be useful in describing it to others, and reach beyond the stepwise guidelines into a consideration of some of the intricacies of thinking you might tap into to develop the analytic muscle of which we humans are remarkably capable. Interpretive description requires an analytic form that extends beyond taking things apart and putting them back together again. It requires that we learn to see beyond the obvious, rigorously deconstructing what we think we see, testing hunches as to how it might fit together in new ways, and taking some ownership over the potential meaning and impact of the outcomes that we will eventually render as findings.

In the next two chapters, then, we'll dive deeper into the hard work of data analysis, considering the core intellectual processes that you will use in engaging your mind to work with data and various practical techniques available to you for guiding the mysteries of analysis. We'll try to move you beyond formulaic approaches and toward fully exercising your innate analytic and conceptual capacities in turning data into credible and meaningful findings. To get there, we will temporarily break down that process into component parts. In Chapter 8, we will focus on the more technical aspects of the data analysis process, and in Chapter 9 move to the more conceptual realm. As with data collection and analysis, these aspects will operate more concurrently in actual practice, but it is useful to think about them as different aspects of the overall operation. And while we won't prescribe any singular technique here, as there is a wealth of evolving data analysis advice from which to choose, we will create a structure within which you can make informed choices that align well with your own distinctive disciplinary agenda, the problem you are investigating, and your own particular analytic proclivities. We'll also orient you to the general location of the typical landmines that might sabotage your analytic progress or detract from its quality and steer you toward the kinds of intellectual processes that are most likely to

produce a successful interpretive description outcome—a rigorously developed, meaningful, and satisfying set of findings.

### Sorting for Pattern

As we progress through data collection, we tend to feel bombarded with what feel like billions of possible bits of information that vie for our attention. It is important to remember that, as open-minded as we believe ourselves to be, we are already hardwired for highly selective organizing and sorting into what counts as meaningful. For example, when the person we are interviewing mentions a concept such as “anger,” we immediately find ourselves associating that with a conceptual category of “emotions” and assigning it a negative valence. Often, we go much further and create value judgments around it, such as deciding whether it seems “justifiable” and “constructive” or not. From there, our antennae almost instinctively attune to detecting other emotion signals, such that we notice, sort, and organize them more quickly when we have an emerging pattern for them to fit into. Further, it is quite predictable that the frame and tone of our ongoing interview style are shaped by what those antennae are telling us to expect and the emerging patterns that are forming in our subconscious thought.

The basis upon which each of us conducts this rapid-fire processing and sorting is a combination of our personality and experience, including our disciplinary orientation as well as the particular biases and curiosities that derive from it. While we have many mechanisms by which to try to understand the former, the latter often take the form of mythical “trickster ravens” defying our conscious control. The process of developing experience and expertise as a qualitative data analyst is therefore very much one of learning technique and developing genuine insight, enjoying those tricksters where they can be helpful in seeing things in fresh ways, but also ensuring that we keep them safely under control in their cages. We need a lot of insight about who we are and how our own particular mind works in order to maintain appropriate oversight of what we see within the data and consequently what sense we begin to make of it.

The initial phases of data analysis become a time of allowing ourselves to react to the initial pieces of data that are swimming around in the collective soup until they seem to rise to the surface and attract our attention. Within the thousands of words exchanged in the course of an interview, some choice words or phrases are very likely to “stick” in our minds—to take prominence in our attention and demand consideration. It is useful to reflect on why this occurs. First, our minds are necessarily primed with expectations of what we are likely to find when we make an observation or conduct an interview. That which is most likely to be memorable is either the prototypical case that fits the expectations or its diametric opposite. Because the mind is highly excitable when it encounters the unexpected, we may well find it is the “contrasting case” that

evokes the strongest sense of curiosity and delight, leading us toward exploring it in more depth and detail, as well as theorizing about why it has occurred. We then become sensitized to patterns that fit both the prototypical and the contrasting case, simply because we are now attuned to them and have stimulated our sensitivities to recognize them when they occur. Conversely, it is also possible for us to ignore or “block out” contrasting cases, simply because we don’t hear or see them. If we become overly focused in our attention, even when we intend to come into the field fully “open,” our minds may selectively disregard that which they feel is not among the stimuli that they are seeking to find. So an early aspect of the data analysis process involves making accurate records and allowing yourself the time to spend immersed in those records so that you can begin to develop a sense of the whole beyond the immediate impression of what it is that they contain.

### *The Coding Tradition*

From the earliest engagement in data collection, most methodological guides focus their analytic guidance on processes relating to coding the pieces of data so that those data will later be amenable to sorting into patterns, testing those patterns for relationships, and conceptualizing those relationships into findings (Crabtree & Miller, 1999b; Saldaña, 2021). This idea of attaching a “code” to a piece of interview transcript or field note derives from assumptions that one knows what the element entails, what other kinds of things might be similar, and what it ought to be distinguished from (Adu, 2019). I find the metaphor of laundry sorting helpful in explaining this. Essentially, coding represents the initial basket into which the laundry is being sorted—dark versus light, and various shades of color, for example. However, as anyone who has experienced bringing two distinct laundry styles into an intimate relationship will have learned, there is a great deal more to the subjective judgment than simply detecting color shades. Different people’s strongly held opinions about laundry will involve distinguishing natural fabrics from synthetics, color-fast from those requiring individual attention, and even items of washable clothing from those that ought not to have been placed in the laundry basket to begin with. In the case of laundry, the preliminary sort that may have been performed by one member is easily reversed when the family’s chief laundry authority surveys the entire basket. However, once that initial load of laundry has begun in the wash, you become somewhat more limited in your options. In the case of data analysis, if an initial sort is based on entirely the wrong set of codes, the collection can quickly become sufficiently vast that it becomes all but impossible to undo the damage, and beginning again at the beginning feels terribly discouraging. This is why I encouraged an element of caution against overenthusiasm for data management software in the previous chapter, as software is highly reliant on coding. Like all good electronic devices,

these software programs have compelling organizing features that tend to shape behavior and even thinking. And you want to be confident that those features have not overshadowed your use of reason, intelligence, and inductive thinking in driving the analysis. When researchers abdicate responsibility for any of those aspects to their technology, premature coding and sorting become serious threats to their capacity for high-quality analysis.

Cautions aside, it is almost inevitable that some form of coding or grouping will be needed in order to sort and organize the information you have collected into a manageable form. It can be instructive to consider some of the formal coding techniques that have been generated in relation to other forms of qualitative research and, in some instances, to draw inspiration (if not direct authority) from them. In particular, some of the more enthusiastic coding guidance comes to us from the grounded theory methodological tradition (Glaser & Strauss, 1967; Strauss, 1987; Strauss & Corbin, 1998), within which three distinct forms of coding are widely recognized. *Open coding* (also known as microanalysis or line-by-line coding) involves “fracturing” the data—taking it apart and examining those discrete parts for the similarities and differences they reveal. This process helps to distinguish basic conceptual units within the data, delineate the properties that characterize them, and organize them into categories. *Axial coding* begins with the categorized conceptual data and creates the mechanism through which interactions among them can be worked out by identifying such properties as the conditions that give rise to them and the contexts within which they are typically embedded. It requires a formal testing procedure as these relationships are considered, drawing on existing data and ongoing data collection to verify the extent to which proposed connections hold true. Finally, *selective coding* occurs when axial coding has illuminated core categories to which all other subcategories relate and builds a conceptual framework from which to generate the new grounded theory. What becomes apparent when we consider the three forms of coding together is that they explicitly link the early analytic processes to the larger social purpose of the enterprise—building a coherent theoretical position that explains variation within the phenomenon (Strauss, 1995). This complex set of intellectual operations explains why grounded theory done properly is a massive proposition and why selectively adopting a minor subset of the coding operations may not represent a satisfying analytic approach (Stern, 1994).

A good coding scheme is one that steers you toward gathering together data bits with similar properties and considering them in contrast to other groupings that have different properties. In interpretive description, because the objective is rarely at the fine-tuned level of words and expressions but far more often in the realm of thematic meaning patterns and recurring insights, it is quite important not to be derailed by excessive precision in your early coding. For example, while you might initially notice expressions within the description of an illness

experience that contain the word “depressed,” your initial coding is likely to need to be sufficiently broad to also include “discouraged,” “down,” “sad,” or even “not all that happy” in order that you can begin to grasp what the underlying shared intent might be within that collection of accounts. With a broad-based code, you will create a collection from which you can then begin to consider whether some of these utterances refer to the illness itself while others reference life events consequential to the illness, whether they reflect initial conditions or the trajectory of disease, or whether they reveal the profound emotion that is the central theme or perhaps something of a contextual background to what seems to be the real story. Thus, in this example, the initial code is creating a mechanism by which you can bring together a group of data bits that *might* be thematically related (or might not) so that you can interrogate those pieces of data as an evolving collective whole, as well as continue to ask questions about the relationship it might have to other aspects of your unfolding understanding of your data set.

Taking this coding example further, by noticing early on in your study that many interview accounts did include such “meaning units,” you might assign a “depressed” code to the collection, evolve your preliminary definition of the code to allow for a fairly wide inclusion but still permit distinction from other kinds of data, and then keep the idea of “depressed” in play until such time as it seemed clear to you that the important underlying idea would be more meaningfully represented by quite different groupings and descriptors. If, by this time, you have invested a significant amount of time and energy carefully labeling all of the items within the “depressed” basket with their various terms and valences, you are naturally inclined to resist completely eliminating this code, and your mind is likely to want to bargain with you for retaining it and simply adjusting the term with which you reference it. This kind of compromise is precisely the pitfall against which I am trying to safeguard you, and this is why I encourage using only the most broad-based and “generic” coding schemes until such time as you have moved quite a distance down the analytic path, can take a bird’s eye view of the evolving whole, and can more clearly discern the implications of your increasingly explicit and fine-tuned coding sensibilities (Thorne, Reimer Kirkham, & O’Flynn-Magee, 2004).

Unlike the fixed-form coding that is employed within deductive research traditions, coding within inductive research can become an active process that allows you to experiment with trying different angles of vision from which to gaze upon the whole complicated collection of data bits so that you can begin to appreciate the implications of each of the available options for handling, grouping, and reconstructing patterns within them (Jackson & Mazzei, 2013; MacLure, 2013; Rorty, 1989). Where coding fails to serve this purpose, and especially where it becomes a slave driver all on its own, it becomes fundamentally counterproductive to the process of generating good research findings. As

Bazeley puts it, “If you are simply recording or organizing rather than engaging in interpretive thinking, coding has the potential to become a headache, rather than a pathway to enlightenment” (2013, pp. 153–154). Research reports generated on the basis of premature or excessive coding tend to read as “bloodless findings,” in the sense that they offer nothing new or different from what we would have initially observed and miss the opportunity to use structure as a means to elaborate meaning. Solidifying your codes into tightly bounded definitional categories may have some appeal to those concerned with conventions such as interrater reliability (O’Connor & Joffe, 2020), but runs counter to the more applied notion of active inductive reasoning within which coding is best used in the context of an ongoing, thoughtful, and critically reflective decisional process (Elliott, 2018). Thus, coding is a tool to be used cautiously, critically evaluated at every stage of the analysis, and kept firmly in its place. It has a role to play in helping us along, but it is a crude replica at best of the marvelous innate capacity we humans have to find meanings that lie hidden within apparent chaos.

### *Alternative Sorting Options*

Instead of simply reading through transcripts and field notes, most researchers find they gain a better immersion experience by engaging with them in a more tactile manner, such as jotting down marginal memos or highlighting with colors to reflect apparent thematic similarities. Because they tend to be less formalized and more creative than conventional coding systems, these kinds of practices may be more consistent with the evolving analytic thinking that you are attempting to stimulate through interpretive description. “Coding” implies a certain term or signifier being applied or not applied to each data instance. It becomes strategic once you are highly confident that you do want to harvest all instances of a particular thing, and you can distinguish what does and does not fit the category. Long in advance of that certainty, however, you are going to want to “flag” for yourself certain data elements that you think may be potentially meaningful for various reasons. They might represent a model case of something you think may be important in your final conceptualization, a contrary case that seems different from all the rest, a particularly poignant or representative sample of something, or an element you have not previously encountered in other cases and want to ensure that you don’t overlook. In many instances, simple “attention grabbers” in your notes will be sufficient to ensure that these data bits aren’t lost—you might use asterisks in your text margins or electronic flags in your files to ensure that your attention will be drawn to them on your next scan of the data, or you might want to copy and paste segments of them into a separate file for quick recovery. Often you will encounter bits of data that you sense may be important in some way to your evolving analysis, but you don’t yet know why.

Because that sensation of not knowing can serve as a wonderful stimulus to your inquiring brain, ensure that you have a special place to track and store these kinds of data bits so you can later return to them with increasingly informed questions about what they might mean in the context of your evolving ideas about findings.

Rather than thinking about your organizing structures as codes, which can reify them into a rigid structure before you realize it, you might consider using various kinds of group signifiers and language referencing devices to ensure that you are able to consider like elements together and begin to compare them with similar or unlike elements in the early phases of your data analysis. Sometimes explicitly assigning meaningless labels, such as “Category A Data,” can be helpful in that it explicitly defers inscribing meaning onto the grouping until you have moved further along your analytic journey. Similarly, strategies of temporarily bringing together potentially similar ideas in a mechanism that doesn’t reflect a significant investment in formal coding can create subsets of the total data that allow you to reread, reflect, and hypothesize long in advance of determining what they are or how they will align within your final analysis. You are testing out relationships between the data as you experiment with different ways of organizing your material and allowing yourself to see what new questions and possibilities arise. Word-processing systems are especially useful for this purpose, allowing you to copy and paste text excerpts into electronic files with descriptive titles that capture the nature of the collection without prematurely implying meaning. When using such systems, it is always wise to embed a location code (such as participant number, transcript page number) with perhaps further descriptive information (48-year-old married man with lung disease) so that you can quickly envision the larger context in which the initial data bit was contained and aren’t tempted to consider it out of that context.

A factor that tends to steer us toward premature coding in qualitative research is the understandable urge not to lose those marvelous “quotable quotes” that we encounter within our data even before we necessarily know what meaning they actually illuminate. Often, we hear an especially powerful or poignant account and “know” that it contains the seeds of an important insight that we feel compelled to ensure will be included in the final rendering. The hazard with these is that they can be more intrusive in our thinking than they deserve, sticking in our minds such that we become invested in organizing our analysis around them. The best way to ensure that doesn’t happen is to manage them as a special kind of data and constrain them within a suitable cage until we are ready to unleash them. My recommendation is to flag and harvest those especially powerful bits early in the data analysis process, perhaps creating a “quotable quotes” file. This strategy reassures us that they will not be lost and reduces the risk that their urgent claim upon our attention will overly dominate our evolving analytic structure. Being human (and qualitatively oriented), we are all suckers for the

vivid anecdote; we know how powerfully they can communicate our message, and we also know how carefully we must handle them if they are to advance, rather than detract from, our scientific credibility. So, give them their due from the outset, promise yourself they will find their way into the final report regardless of structure, and you will find that their individual voices become far less insistent within the chorus of analytic possibilities.

### **Making Sense of Pattern**

Beyond organizing the data bits into various groupings, the work of analysis involves making sense of what relationships the various groupings might possibly have one to another toward the ultimate aim of inductively building some sort of coherent whole (Malterud, 2012). To get there, you will be using an iterative reasoning process by which you gradually come to understand the implications of thinking about and aligning your ideas in various ways, such that you can make the best organizing decisions to serve the purposes of your particular inquiry (Miles & Huberman, 2019). Analyzing data is a bit like choosing how to display a deck of playing cards. If we are accustomed to playing bridge, we tend to instinctively organize the hand we are dealt into suits. However, if you step back from that first instinct, you can begin to see many other possible organizing options that might reveal different aspects of the full deck. You might lay them all out according to color, sequence them by rank, or separate out the court from the number cards. You might even create a new order of precedence, with the “one-eyed Jacks” taking the lead. And what you will notice is that with each different display, the deck of cards looks a bit different and begins to hint at a different “story.” Extending the metaphor further, you might build them into a house of cards, tear some of them in half, or string them together as a wall hanging. Your options are actually endless once you break free of your initial assumptions as to what you are supposed to be doing or are allowed to experiment with.

Taking this metaphor back to the business of data analysis, your complete set of data will offer you infinite possibilities in terms of groupings, relationships, and associations. Much of the work of data analysis will be about trying to imagine what some of the more promising options might be and then finding a way to select among those options the one that is going to become the organizing structure for conceptualizing and presenting the most meaningful set of findings possible from the material you have available. If in the early stages of working with data you get stuck on an initially appealing pattern or overinvested in a particularly elegant coding scheme you have devised, you will reduce your chances of fully exploiting your intellectual capacity to consider other relationships between the pieces that might break down that initial grouping structure. To prevent that, we will now consider various strategies for staying in control of your analytic process, even as you allow it to imaginatively explore its possibilities.

### *Knowing Your Purpose*

In the applied research world, the reasons we enter into a qualitative study are strongly aligned with our passion for our field of practice and our sense of the kinds of knowledge needed to advance it in achieving its distinctive purpose. For this reason, while there is much within the social science qualitative methodological armament that we might quite usefully borrow for our applied research work, there are also ways in which conventional technique can complicate or compromise our ultimate aims. The issue of coding discussed earlier in this chapter is a case in point. The meticulous technique of data coding that can be quite useful in the discovery process of a formal grounded theory study can get in the way of good interpretive thinking when taken to excess in the context of an applied qualitative study. Similarly, we will find that there are a number of solid and sensible recommendations tailored to augment the social theorizing objectives of some of the conventional methods that can steer us in directions that are inconsistent with the disciplinary purpose for which we are conducting a study or the nature of the knowledge claims that will serve the intended audience of our research product. As we work through some of the options you might consider to support your analytic process, the most important message to keep in mind is that analysis techniques are merely tools to help you think differently and expand your angle of vision with respect to the problem you set out to study and the research question you have framed to guide your inquiry. If the analytic path you have chosen seems to be taking you further and further from that original purpose, you will want to step back and reclaim your authority as the analyst who is quite capable of thinking this through.

Remembering your purpose is not a matter of holding tightly to the assumptions with which you may have started your study such that you are closed to new possibilities. Rather, it has more to do with remembering why someone from your applied field would want to be studying the phenomenon in the first place. As we discussed in Chapter 3, the disciplinary orientation that inspired your applied study becomes a central and meaningful tool for informing the analytic lens within which you can begin to distinguish *relevant* patterns within the data. You have entered the study not to discover the basic nature of a phenomenon in the classic sense of a social scientist as much as to understand it better—what conditions it works in, how it feels when it is happening, what features of it become important to those experiencing it, or how it makes sense to those involved. You will undoubtedly encounter many instances of data that are already familiar to you and to your discipline and are not necessarily relevant to answering the research question you have posed. So you will be making relevance and meaning judgments at every step of the way in winnowing a large collection of data bits that are more or less relevant to your purpose into a smaller and more strategically selected grouping of ideas that will ultimately form that which you consider your

findings. Thus, your disciplinary scaffolding can be highly useful in keeping you on track throughout the course of analytic pattern recognition. You are not going to cling onto it so tightly that no new insights about the phenomenon are possible but rather return to it again and again as a kind of guide to the directional choices you will confront. By remembering that you began with a very real purpose and that you have designed a study to meet a particular need in the body of practical or applied understanding, your data analysis process will feel less like wandering in the desert and more like you are always within sight of a well-marked logic trail. You can afford to head out on some of the tantalizingly meandering analytic trails you start to see around you if you haven't lost hold of that line of sight that allows you to steer yourself back to where you need to be.

That said, you will also want to remain vigilant through the use of critical reflection to ensure an ongoing awareness of when and how the habitual lines of reasoning to which your discipline may have socialized you come into play as you begin to try to put your data into a semblance of order. To illustrate from my field of nursing, if we were to encounter a wonderful collection of data bits that look like a "coping strategy," we might find it difficult to step back from and relinquish that grouping within our eventual organizational scheme. And when we get hung up in this manner, we might fail to notice that grouping the data in that particular manner, without considering any other, could actually have misrepresented the overall experiential whole we had hoped to depict when we set out to study that phenomenon. The way in which those inevitable theoretical allegiances and disciplinary biases creep in often has to do with the assumptions we make about the most appropriate line of reasoning through our data based on our prior knowledge. For example, as soon as we have conceptualized this set of data as having to do with a coping strategy, we might infer that there is a shared something to be coped with, that there is something volitional to responding to it, or that the absence of this kind of data in some other parts of the data set might imply "not coping." We could therefore miss an opportunity to recognize that thinking about coping strategies may be one of nursing's shorthand devices for distilling from complex life experience that which we feel capable of influencing. And in so doing, we may re-create as findings the initial disciplinary assumptions that people are in need of nursing's help in particular ways.

Finding that ideal balance between letting your thinking go completely wild and staying tightly bound to your disciplinary orientation is likely to require a bit of trial and error. However, being conscious that this is an essential component of an applied research process will allow you to experiment with the universe of available data analysis techniques without becoming overly dazzled or distracted by them.

### ***Knowing Your Data***

One of the best ways to ensure you allow your mind to move well beyond where you began in your analytic adventure while still being mindful of the ultimate

point of it all is to be confident that you really know your data. To ensure that you move beyond the self-evident and superficial in linking the groupings and patterns within your data, you must consciously engage in various operations designed to shift your attention sequentially from individual cases to the whole data set, from groups of similarity within certain cases to various manifestations of difference within other cases. In so doing, you gradually begin to achieve increasing levels of clarity in your understanding of what relationships exist among instances within your data. Some of the time, data elements that initially seemed disparate will become linked as you begin to better appreciate the implications of their contextual meaning. In other cases, you will deconstruct the initial groupings you generated in favor of better and more comprehensive understandings.

I learned this particular lesson early in my research career. When I interviewed families to better understand their experience when an adult member had cancer, home visit interviews typically began with requests on their part, such as taking a tour of the garden, inspecting some antique furniture carved by a distant relative, getting to know all of the family cats by name, or looking through an album of last year's holiday photos. At first I understood these as the price of gaining *entrée*, not part of the data collection *per se*. However, as my data collection and analysis process evolved, I came to understand these as powerful positioning statements on the part of these families (as in, "you can't possibly understand what cancer has done to us until you have a sense of who we are as a family"). On the basis of that insight, I came to have a much richer appreciation for their role in our interviews and in shaping the quality of the data set I was constructing. Rather than feeling impatient about yet another hundred photographs to review (and wanting to get on with "real" data collection), I was able to deepen my interviewing and concurrent analytic process with the insight that all aspects of the cancer experience were informed by the self-defined understanding of family life that each was so intent on preserving in spite of cancer.

Knowing your data means dwelling in it repeatedly and purposefully and developing a relationship with it. Ideally you will have encountered it initially in the data-gathering process, although it is not unusual as well to do applied qualitative research with data gathered by others or to work as a team dividing up data collection responsibilities. If you haven't been in the interviews or observations directly, you will have to work with what is available to come to "know" the characters and contexts, ideally to become as familiar with them personally as you would with the characters in a favorite novel. By fully engaging in listening to recordings and reading transcription text (ideally simultaneously), you can develop a "feel" for who your study participants are, what their storylines represent, and what the many aspects of their accounts could be trying to convey. Even if you have conducted all of the interviews yourself, you may still be surprised by what you can learn by repeated listening and reading, as new features can reveal themselves with each new iteration. In part, this is because your analytic mind is becoming increasingly expansive or refined in what it is

attuned to, and the questions and curiosities that are captivating your attention will shift throughout the data analysis process. Where you are working with a team, it can be enlightening to capitalize on the different relationships each member might have with the data depending on proximity to the material or presence in the encounters.

As you work on deepening your knowledge of your data, you may find coding and other organizing alternatives can be helpful in tracking your thinking and annotating your analytic curiosities. You are building a sense of both your individual cases (the people interviewed, the cases observed) and also the possible connections among parts of the data set and even the collective wholes. You are testing and exploring, allowing yourself to make note of the interpretive thoughts, questions, and hunches that will help you gain analytic momentum and ultimately culminate in the more fully developed conceptual understandings that will become your study findings.

### *Considering Borrowed Technique*

As with the general sorting and organizing of data into patterns, the process of extending pattern recognition into an understanding of relationships requires active and thoughtful engagement in the work of analysis. Once you have a good grasp of what it is that you are trying to achieve at each level of the analysis, you are better armed to appreciate the significance of various strategies and techniques that may be recommended in the qualitative methodological literature without running the risk of adopting them uncritically. Generating a range of operations, you might try in order to see what you can see within your own bits of data is likely to be an evolving process until such time as you have familiarized yourself with your own distinctive mental aptitudes, including your visual/spatial preferences for data display. The technique used by your dissertation supervisor may not work at all well for you, and rigid adherence to some of the formal guidelines offered within the qualitative data analysis literature may feel more hollow and ritualized than creative and inspirational. An excellent example of this creativity is the process described by Burgess et al. (2021) as their “sticky note” technique for taking a team-based approach in a community-based participatory interpretive description study. Their study purpose was to understand the social, economic, and health impacts of a permanent supportive housing program for persons living with HIV who are at risk of homelessness. Reaching a decision by consensus about the stepwise analytic process they would use, they captured all relevant concepts in 969 sticky notes and then used “mind maps” to create and recreate a synthesis of the whole. Their ultimate conceptual organization of findings was arrived at on the basis of fulsome discussion including both academic and community team members.

What you are aiming for is a series of technical and/or intellectual operations that will allow you to know your data intimately, to consider similarities and

differences with respect to a wide range of dimensions among the various cases you have included in your sample, such that you can follow a logical line of inquiry in relation to individual cases as they illuminate those aspects that might legitimately be considered meaningful patterns and themes within the data set overall. This will necessarily extend well beyond the form generally described as “content analysis,” which in most instances focuses on organizing data bits into a predetermined set of categories, often deriving from the theoretical framework or a set of inquiry questions, although some authors are now using the term to also include some inductively derived latent categorization (Kleinheksel et al., 2020; Lindgren, Berit Lundman, & Graneheim, 2020). It represents what some have termed a “pragmatic” approach to qualitative data analysis, entailing an opportunity to combine analytic strategies and procedures that best fit the strategic priorities of each study, study team, and context (Ramanadhan et al., 2021).

The vast body of literature on various qualitative approaches and steps within the overall qualitative research enterprise offers a wealth of valuable options for working with data so that patterns and relationships become observable. Grounded theory has contributed “constant comparative analysis,” an approach whereby you compare every piece of data (an interview, a statement, a theme) with all others that may be similar or different from it in order to theorize all possible relations among data (Glaser & Strauss, 1967). Such stepwise analytic approaches are best suited to studies in which the purpose is to uncover commonalities and patterns across cases within human experience (Thorne, 2000a). Within this grounded theory tradition, there are examples of highly prescriptive techniques for conducting constant comparative analysis (e.g., Strauss & Corbin, 1998). While such recipes may prove comforting to new researchers in that they create the illusion of a manageable sequence of operations, uncritical reliance on them tends to make it difficult to move beyond thematic analysis and into the more creative and interpretive realms of figuring out options for depicting patterns and meanings.

Phenomenology offers a rather different analytic strategy, since its purpose is to discover the underlying structure or essence of a phenomenon (Colaizzi, 1978; Giorgi, 1985; Ray, 1994; Van Kaam, 1969). This approach typically challenges the researcher to set aside preconceptions so that entirely new conceptualizations can be inductively derived from the deep study of specific cases. Although they vary in the extent to which interpretation is an acceptable element, phenomenological approaches all strive for a rich description that illuminates the deep essential structure of human experience.

Ethnographic methods tend to provide a systematized set of patterns within which new data are analyzed and interpreted. These patterns derive from the fundamental assumptions held by anthropology and sociology about human social organization (belief systems, kinship patterns, ways of distributing resources, and so on) (Gubrium, 1988). The analytic process, then, becomes one

of sorting observations into these predetermined general categories, searching for inconsistencies and contradictions, and generating increasingly integrated conclusions about what is happening and why.

Discourse analysis and narrative inquiry methods also invoke distinctive processes for data analysis. While both draw our attention to linguistic representations of human experience, they rely on different aspects of that representation as a source of meaning. Narrative approaches tap the order and organization we humans give to cognitively unstructured life experiences when we articulate them in a communicable form (Muller, 1999; Sandelowski, 1994b). Discourse analysis recognizes speech as an explicit linguistic tool that has been devised on the basis of various social influences and orients us toward understanding what else is represented in the various ways in which people communicate ideas (Boutain, 1999).

Beyond these explicit qualitative methodological traditions, one can also draw analytic inspiration from many other specific interpretive techniques that have been generated to address particular kinds of questions. As Feldman (1995) explains, ethnomethodologists seek out processes by which people make sense of the institutions through which they live and the interactions they have within them; semioticians seek surface manifestations and the underlying structures from which they denote meaning; and deconstructionists look for the multiple meanings that are implicit within events, conversations, or texts. In relation to each of these explicit purposes, interesting analytic maneuvers have been articulated in the literature that you may find useful when using interpretive description to study specialized topics.

Thematic analysis (especially as referenced in Braun & Clarke's 2006 paper) has become highly popularized in recent years, such that reference to it appears in the analytic strategy reports within a wide range of qualitative traditions. And although these authors have subsequently written expansively about that approach, including a 2021 text that provides added practical guidance for reflexive application (Braun & Clarke, 2021), it is that rather simplistic earlier manuscript that remains most extensively used and cited (Wolgemuth, Guyotte, & Shelton, 2025). Further, the superficial stepwise process that people most frequently draw from that early source includes very little by way of critically reflective thought or intelligent application of inductive reasoning (Braun, Clarke, & Hayfield, 2019). And since the term "thematic analysis" itself is something of a generic way of describing what qualitative analysts do, those who cite that reference are sometimes using it as a convenient way to justify their approach through a named and popular analytic process. And while I can fully endorse the general intent of the approach (either generic or as formalized by Braun & Clarke), what concerns me is that it is most often interpreted as a means by which to thematically group and organize entire data sets. Since interpretive description studies done well will start with an awareness of the whole but

move fairly quickly into discerning relevant subsets of that whole—specifically subsets with a particular relationship to the study’s ultimate aims—an uncritical uptake of thematic analysis as it has been commonly represented can steer you in a direction that characterizes a data set by summing it up into themes without mining it for what other options there may be for meaning. As Morgan (2018) and Wolgemuth, Guyotte, and Shelton (2025) have observed, far too much of the currently published qualitative literature stops with naming themes and falls short of contributing to interpretation. Thus, I encourage the idea to be used with caution, with the principles of interpretive description providing ultimate guidance. Although qualitative data analysis can feel daunting, and an easily accessible lifebuoy dangling close at hand can be tempting, this is not the time to give up on the search for findings that will really make a difference within your field.

Within the literature of each of these methodological and analytic traditions, the reader can find excellent examples of analytic guidance that enhance analysis in the interpretive description context. Indeed, a robust, mature program of interpretive description research may ultimately draw inspiration from techniques devised from a wide range of these approaches, including those that may seem methodologically incompatible. What distinguishes interpretive description, however, is that none of these approaches is borrowed uncritically or used in a manner that is entirely faithful to the original tradition. Instead, the researcher using an interpretive description approach remains mindful of their obligation to account for the relationship between the technique and the underlying approach to what constitutes knowledge from which it has been extracted. This ensures that attention to technique does not degrade the analytic process into a collection of empty categories that will have limited usefulness for the generation of new knowledge (Eakin & Gladstone, 2020; Finlay, 2021; Silverman, 1993).

### *Capturing Analytic Insights*

Beyond using visual and syntactic reference points as a means of becoming familiar with what your data set contains (such as in some forms of reflexive journaling), I recommend that you also create a set of analytic notes that will allow you to ask increasingly complex questions about what it all might mean. Although analytic memos can take many forms, I personally find it helpful to have a blank notebook I can keep with me at all times during an analytic season, into which I can enter dated collections of thematic lists, pose questions among cases, and jot down emerging patterns that I wish to track. The advantage of the blank page (or the open screen) is that it invites you to engage with it in a new format each time you write. Today’s entries might look like “ways of ...” or “kinds of ...” descriptions, while tomorrow’s might look like trigger questions for your ongoing analytic reasoning, such as “I wonder if ...?” or “Have I seen other cases of ...?” Some of us think in taxonomies of word lists, others

in visual “bubbles and arrows,” and the blank notebook permits experimentation with a range of representations that can make manifest your evolving thought and inquiry. During regular brainstorming periods, it is wise to jot down every key element that you think you may be seeing. Reviewing what you have written and allowing your interpretive mind to ask questions of it repeatedly, you can engage your thinking toward grouping, connecting, or highlighting these more disjointed early entries. From what begins as random bits, you will find that you are gradually starting to see the beginnings of order and organization take shape over time, not through some magical process but with the benefit of your disciplined critical reflection and continual interpretive challenge as to possible options for that organization. When you have documented the complex stages through which your thinking evolves as you come closer to fully formulated analytic conclusions, you begin to feel a real sense of ownership over the eventual structure that your findings will take, and your research becomes a convincing product of that process.

Over time, this kind of intensive analytic memo processing tends to increasingly refine a set of ideas that play a progressively more important role in your ongoing data collection/construction process, sensitizing you to explore further for expansion and clarification when one of these ideas is casually referenced in conversation and to seek contrary or different cases as you encounter more instances within the real world (either in your data set or in the wider contextual and disciplinary world you inhabit throughout your research journey). While you may find that you begin with dramatically different ideas as to what might constitute an important observation or an emerging relationship between data pieces, over time you will likely find that certain ways of thinking about these elements become more compelling, and certain relationships between them become more reflective of the story that simply must be told if others are to understand what you have come to hold meaningful. Becoming truly committed to the eventual analytic structure that will best serve your findings requires that you fully appreciate its implications and enables you to clearly identify its advantages over other organizational structures you might have considered to showcase the various data elements. So throughout the organizing, conceptualizing, writing up, and presenting phases, you’ll appreciate that you committed this internal dialogue onto paper or digital record rather than trying to reconstruct it all from memory.

# 9

## TRANSFORMING YOUR DATA

### Transforming Pattern into Findings

Although data analysis is justifiably depicted as excruciatingly hard work, it is important not to get so caught up in the tough slogging that you forget to enjoy the marvelous intellectual adventure you are on. For the researcher who has taken up interpretive description in order to address an applied practice problem and learn more about a phenomenon central to their professional work, it is imperative, after you have spent many exhausting months reviewing the literature, developing your research proposal, entering the field, and gathering data, not to lose sight of the passion and curiosity that brought you into the inquiry in the first place. The enormity of the effort it takes to bring you to the data analysis stage is part of what makes data analysis so difficult, and it is important to ensure that you avoid feeling overwhelmed with exhaustion and overeager to finish up your research project quickly. The difference between an excellent research product and one that is mediocre or worse depends on your capacity to continually reignite the flame of enthusiasm and fully engage in making sense of the hard-earned data you have before you. For this reason, it is essential to plan on a significant investment of time in the data analysis phase and to ensure that you find ways to charge up your batteries to sustain your energy for the duration. Fortunately, you will also find that data analysis can also be surprisingly fun. The intellectual excitement that comes with truly engaging in the creative activity of working data patterns into a rigorously thought through conceptualizing that sheds new light on something you are passionate about is marvelously rewarding. And, as MacLure has expressed it, “there is, or can be, a languorous, and not wholly cerebral pleasure in giving oneself over to the data” (2013, p. 174).

In the discussion of the “work” of data analysis in the previous chapter, I made a fairly strong argument against early or excessive coding because of the effects it can have upon the capacity to see beyond the codes and the enthusiasm you can muster for considering alternative angles of vision that might better illuminate the analytic problems you are thinking about. My motivation was to help you avoid the burden of having invested so much time in coding that you become unwilling to abandon your initial system and also to keep your attention on the inductive analytic capacity of your mind as the primary source of fuel for the analytic process. Despite the rhetoric that you might read in some research reports, findings never “emerge” from the data on their own, and if they are to be worth something in the end, they always come about because a human mind has engaged strategically and constructively in the business of active analysis. Further, although researchers are certainly experimenting with what generative artificial intelligence technologies might be able to contribute to qualitative data analysis (e.g., Christou, 2023; Morgan, 2023; Wachinger et al., 2024), they are quite justifiably doing so with great caution, knowing the predictable limits of conceptualization, integrity, and interpretation that are observable within currently available modalities (van Manen, 2023). We will all watch with interest the expanding debate on this in future years, and for the present, safely assume, I think, that human intellectual activity in asking and answering the pressing problems of our applied disciplines will not be surpassed or replaced by machines in our lifetimes.

One way of ensuring that you rise above the drudgery of analytic work and keep your mind lively and in control is to find ways to take delight in the process, to trigger your innate curiosity, and to follow the many lines of fascinating inquiry that your inductive processes illuminate. What you are trying to achieve is what May (1994) refers to as an acquired aptitude for “magic.” Here we’ll consider two ways of keeping your mind lively through the analytic process—using various techniques to avoid the tricky hazards along the pathway and sustaining momentum toward the goal.

### **Envisioning Possibilities**

The overarching intellectual task driving your data analysis journey in an interpretive description study is making sense of which ideas are core to what you are studying, within the specific applied purpose for which you are studying it, and which ideas may be more usefully understood as context. Among all of the many ideas that will have surfaced in the process of constructing and working the data in relation to your research question, taking your analysis to the next level involves sorting through the possibilities of pattern to determine which will play a fundamental role in your understanding of the phenomenon about which you have posed your question and which may be common, and even important, but are essentially part of some other story or question. In other words, you are seeking a way to account for the boundary between these two options.

### *Confirming Your Bases*

As your mind moves from data to pattern and from pattern to relationship, you need to continually find ways to confirm or challenge the basis upon which your mind is making linkages between the pieces and parts within the data. Stepping away from the data to ask yourself “What am I seeing?” and “Why am I seeing that?” forces you to acknowledge that there is much else to be seen and that alternative lenses might have generated slightly or even substantially different perspectives on what was there to be found. What you will typically recognize is that, in the midst of an effective data analysis process, you will cycle between periods of supreme confidence in what you are interpreting and other periods of profound doubt that you can find anything meaningful within the overall chaos. Don’t despair, because this subjective experience of data analysis is a positive sign that your critical mind hasn’t failed you and a helpful reminder that interpretive description findings don’t come easily.

Just as you allowed your coding processes to remain tentative until such time as you had a solid basis for confidence in a particular data grouping, you’ll want to allow yourself various mechanisms for confirming the reasoning upon which you begin to identify patterns and relationships within the data. Although the term “validation” is sometimes used in the literature to allude to the idea of truth measures, what constitutes truth is a somewhat challenging proposition in interpretive description (as with most qualitative studies), especially when you are in the midst of data analysis. One technique that qualitative researchers often advocate as a credibility measure is “member checking” (Erlandson et al., 1993; Mero-Jaffe, 2011), whereby you go back to your study participants to ascertain whether they will confirm having said what you think they said. While that step is widely understood as a credibility measure (Birt et al., 2016; Motulsky, 2021), it can also lead to false confidence and potentially derail you from good analytic interpretations if they do not fit the more narrow view that any single study participant may have had access to (Lincoln & Guba, 1985; Thorne & Darbyshire, 2005). In interpretive description, a researcher is not simply a vehicle through which study participants speak but an interpretive instrument capable of making sense among cases to uncover insights that would not normally be accessible to you if you were only familiar with any single case. Therefore, although it is terribly important to ensure that you have your facts straight, depending on the nature of the study it may or may not be appropriate to assess whether the study participants themselves would agree with the interpretations you are drawing on the basis of the accounts they may have provided. Thus, while going back to your study participants to see what further insights you can tap as your analytic process proceeds is often a fruitful and enlightening experience, thinking of it as a “check” can detract from forward progress.

**BOX 9.1 UNDERSTANDING EVIDENCE UPTAKE**

Despite the availability of an extensive body of research to inform nursing practice, an international team of nurse researchers was concerned that many patients still fail to receive evidence-based care. They decided to study a comprehensive academic medical center with a long history of having effectively used a particular model of evidence-based practice to learn more about its success factors. Combining in-depth interview data with published literature and internal documents, the team identified the elements necessary for an evidence-based clinical environment, including not only the introduction of a shared model, providing support for the knowledge infrastructure and essential training, and a coherent system of active team facilitation, but also the presence of an organizational culture and leadership that allows innovation and evidence-based practice to flourish.

Duff, J., Cullen, L., Hanrahan, K., & Steelman, V. (2020). Determinants of an evidence-based practice environment: An interpretive description. *Implementation Science Communications*, 1, 85. <https://doi.org/10.1186/s43058-020-00070-0>

***Expanding on Associations***

Despite the limited utility of the conventional “member check”, going back to the source of the data, either systematically or selectively, can often be an extremely important step in transforming data into findings. When you bring your observations and initial tentative interpretations based upon them back to the study participants from whom your insights derived, you are sharing with them not simply a reiteration of their own contributions, but rather a synthesis of what you have learned from many such encounters and offering an opportunity to have them reflect on the extent to which it does or does not ring true to their experience. Using repeat interviews as a mechanism for confirmation, clarification, and elaboration on the essential relationships you are beginning to suspect within the overall data set is a powerful tool for helping you clarify what seems self-evident (but sometimes not articulated) to those involved, for surfacing the philosophizing they may have done about their situation, and for testing out the impact that giving the ideas some shape will have upon their understanding and experience. You might also achieve a similar kind of confirmation or elaboration with strategic purposive sampling for a small number of new study participants. The advantage of additional data collection later in the analytic process is that your interview or observation strategies, in contrast to the initial encounters, will inevitably be shaped somewhat differently by virtue of being informed by the evolving analysis. Ideally, this dialectic between the

data collection and analysis occurs until you have formulated a compelling basis upon which to draw meaningful conclusions as to findings that do justice to your research question.

With conventional member checking, you tend to feel you have done the right thing if everyone agrees with what you said you heard. However, a more strategic and purposeful return to your sources can be infinitely more productive. Reentering engagement with a data source at the stage where your analytic interpretations are starting to take shape can push you further into expanding the comprehensiveness of the tentative associations you are making between aspects of the whole, confront you with more questions to ask yourself, and potentially challenge the direction of your thinking before you have reached the point of no return. When you push your thinking forward in an open attitude that involves critical reflection on what you know and how you know it, you begin to build increasing confidence in the credibility of the interpretive understandings that are starting to take shape. By challenging yourself in these ways, you avoid stopping at the obvious, keep interrogating what you think you are finding, and dig deep enough to generate findings that will have real meaning and usefulness.

### *Testing Relationships*

As you move forward with your analysis, you will want to ask yourself, “What ideas are starting to take shape such that I think they will have to have a place in my final analysis if it is to do justice to the research question I have posed?” This kind of question takes you back to the scaffolding supporting your original goal for the study, including the disciplinary assumptions and expectations you may have brought into it. When you challenge the relationships among data about which you are feeling increasingly confident against this backdrop, you step back from the immediacy of being immersed in data and allow yourself to see the emerging analysis within the context of that larger purpose. In this manner, you make it easier to identify those elements of the emerging relationships that require “testing” or further challenge. This reflective step is quite helpful as you determine how you might go about engaging in that testing in order to effectively ground your eventual findings.

It is very exciting when the ideas you are forming about relationships begin to really take shape and form patterns. While it can be tempting to try to “nail them down” immediately, your note-making habit will allow you to document them for future reference while continuing to keep them in a state of suspension until you are well along the path of analysis. At this stage, you will be asking yourself such questions as “What pieces of the puzzle am I beginning to see?” and “What do they tell me about the puzzle as a whole?” By allowing your thinking to move back and forth between the parts and the whole, you’ll increase your likelihood of detecting weaker relationships, identifying what to do about them,

and deciding how you might work with them before they can become a viable part of the eventual whole you are building. Toward this aim, Srivastava and Hopwood recommend a simple framework, consisting of three iterative questions, to sustain your ongoing reflexivity: “What are the data telling me? What is it I want to know? What is the dialectical relationship between what the data are telling me and what I want to know” (2009, p. 79).

Testing also implies asking yourself questions about the alternatives. When you ask yourself, “How else might I understand this aspect of the data?” or “If I decide to think about it in this way, what possible aspects of the issue might I be missing?” Being willing to temporarily set aside the promising line of thinking that seems to be answering many of the questions you have asked so that you can imagine other possibilities for how the pieces might all fit together with fewer loose ends or better resolution can help you work your evolving thinking about your data set toward better and better possibilities. And as these options for how the data might form meaningful patterns evolve, you can continue to test each one for the extent to which it would or would not reflect a logical reasoning process from the question you began with toward the purpose you had in mind. Stepping back from time to time to remember your applied practice audience—the knowledge user for whom you sought new knowledge—will help ensure that, in the excitement of analytic possibilities, you haven’t neglected relevance.

### **BOX 9.2 BALANCING GOOD AGAINST HARM**

Multidrug-resistant organisms remain a persistent safety risk for hospitalized patients despite decades of research on and implementation of contact precautions. This Australian team of infection control researchers used interpretive description to better understand the ethical implications of contact precautions implementation. What they learned was that its principles conflict with core clinical ethics principles in numerous ways, including violating autonomy in not adhering to informed consent, a sense of justice by virtue of what seem discriminatory practices, and non-maleficence in the sense of eliciting stigma for patients as well as moral distress and interpersonal conflict for staff. As a result of these insights, they concluded that contact precautions impeded organizational culture, professional well-being, and person-centered ethical care and diverted resources away from more potentially effective options such as antimicrobial stewardship and aseptic technique.

Harris, J., Maxwell, H., & Dodds, S. (2023). An Australian interpretive description of Contact Precautions through a bioethical lens: Recommendations for ethically improved practice. *American Journal of Infection Control*, 51(6), 652–659. <https://doi.org/10.1016/j.ajic.2022.08.010>

### *Capitalizing on Outliers*

As an applied researcher, you possess an important asset for extending your analytic reach in the form of your professional practice knowledge. Unlike the qualitative researcher who is engaging with data for the explicit purpose of theorizing or attempting to bracket all prior knowledge in order to make fresh discoveries, you can explicitly welcome the influence your disciplinary orientation has on your evolving analysis. Thus, beyond the limits of your current data set, you also have access to a wider span of case knowledge from which to shape the way you frame your emerging findings. Toward this end, as your analytic process unfolds, you can afford to ask yourself, “What do I know is out there that I might I not yet be seeing?”

When you accept that you cannot have captured in any data set all possible relevant variations on a theme, then the applied practice thinker in you allows for probing your analysis with questions like “What else might there be to see?” and “How do I know that?” Although we usually fully intend to seek maximal variation within our study samples, we can’t really know until we are fully immersed in the study what the entire set of truly relevant variables might include. Our initial purposive sampling strategy typically includes the demographic or conditional variables that we can predict from the literature might lead to variation within the experience. However, it is often not until we have begun to formulate ideas about relationships among data that we can authentically discern some of the more relevant latent conceptual variables that could be quite important to the credibility of our eventual claims about findings (Boychuk Duchscher & Morgan, 2004; Glaser, 2002). In some instances, once we’ve detected that we ought to see a case that meets certain conditions, we can locate that case and expand our data construction accordingly on the basis of that case. In other instances, we can only theorize that cases fitting such conditions might exist.

I believe that it is important and authentic to the applied research enterprise of interpretive description to ensure that an appreciation for what might have been found had a wider range of cases been included in the study is built into the analytic thinking. In contrast to a claim of “saturation” (which, as we noted in Chapter 5 has all too often evolved into a ubiquitous and somewhat arrogant assumption that one has tapped all relevant human variation (Caelli, Ray, & Mill, 2003), applied researchers can draw upon “theoretical outliers” from within their own case knowledge or that shared by their discipline. By this I mean that they can engage in a practice-informed imaginal exercise as to what kinds of additional cases might have shed light on the aspects of the phenomenon that they have not been able to see in their sample and what kind of contribution those cases might have made (McPherson & Thorne, 2006). For example, if you are heading toward an interpretation that matters of the spirit are of utmost importance to persons nearing the end of life, your practice experience and knowledge might prompt you to wonder what additional insights might have arisen had you

included in your sample those for whom formal religion had been abandoned or who prided themselves on a committed atheism. In some instances, you can create virtual access to the kinds of outlying cases you have hypothesized through published lay literature reports or through recollections of “expert witnesses,” including practitioners who may have encountered rare instances of various phenomena in the course of their extensive practice. Whether the outliers are available to you or not, merely thinking through that they might exist and what it is that they might have theoretically contributed to your evolving analysis can often be sufficient to ensure that you frame your findings in a manner that does not ignore predictable as well as rare but relevant variation. And by taking this additional step, you help ensure that your evolving findings will reach the eventual ears of your practice audience with a genuine ring of authenticity.

### *Engaging the Critic*

Some of us have a sufficiently disciplined habit of mind that we are able to forcefully critique our own analysis even as we are fully immersed in it. Others may find that aspect of interpretive description excruciatingly difficult and may devote considerable energy toward avoiding self-criticism or defending their position. However, if we deflect critique of our ongoing analysis, no matter how tempting, it will become difficult along the way to develop the kind of grounded confidence that we will really need to depend upon to sustain the analysis through to conceptualization and writing up of findings as well as to the later elements of critically interpreting our findings and considering their implications. Because inductive analysis relies on a part of the mind that feels generative rather than formally “analytic,” even the most scrupulously honest analysts can find themselves worrying that they are “making this up.” In contrast, the researcher who is overly confident that there is only one story to tell may not have recognized their own role within the telling.

Although it is important to stay in control of the findings that you are building in articulating relationships among data and to ensure that all aspects of the account are thoroughly grounded in a highly particularized manner, you can employ the external critic to great advantage within this process. By capitalizing on the tensions arising from the way that you imagine other people might read the same data, you paradoxically increase your sense of confidence by allowing yourself to understand and account for different perspectives. Sometimes it is useful to set up a kind of virtual “dialogue” between opposing perspectives on what the data reveal as a mechanism to exploit variations. Another technique you can experiment with involves going back to the literature, checking to see whether the “new insights” are really all that new, and challenging yourself with how certain authors or experts might see elements within your data quite differently. Asking what a particular expert might have said about the patterns you

are seeing within the data can help you sort out the extent to which you may be relying on particular angles of vision and perhaps obscuring others as you begin to formulate the understandings that will best serve the research question, capitalize on the available data, and meet the ultimate purpose of your interpretive description research.

### **Building Findings**

Identifying which data pieces are important, grouping and sorting them into patterns, and considering relationships between the pieces and patterns are all aspects of the complex inductive reasoning process through which you move closer to something that could constitute findings. In interpretive description, that which we consider “findings” is not simply reporting the first credible set of patterns that emerges from your sorting procedure. Rather, findings reflect an interpretive maneuver within which you consider what the pieces might mean, individually and in relation to one another, what various processes, structures, or schemes might illuminate about those relationships, and what order and sequence of presentation might most effectively lead the eventual reader toward a kind of knowing that was not possible prior to your study. In effect, we allow the reader to “know” something new about the phenomenon by virtue of the manner in which our rendering has both structured and sequenced it.

According to Wolcott, “interpretation is essentially a process and product of mulling” (1994, p. 287):

When you emphasize description, you want your reader to see what you saw. When you emphasize analysis, you want your reader to know what you know. When you emphasize interpretation, you want your reader to understand what you think you yourself have understood. In different ratios, for different purposes, we try to accomplish all three.

*(Wolcott, 1994, p. 412)*

In the context of inquiry in applied and practice fields, you are explicitly designing your study to take your colleagues beyond what they already know and toward something new, some new way of understanding a phenomenon of concern within that practice context derived from the distinctive insights that can only be learned from this particular form of engagement in inquiry. You explicitly designed your study with the intention to add value to the field of knowledge in your applied world (Eakin & Gladstone, 2020). So, as you move toward building that which we will depict as your “findings,” you may need to remind yourself of what is already known and why you asked the question that has driven this study. At this stage of analysis, it is wise to repeatedly take stock of that “line of sight” you have created between the research question you have posed and

the intended audience for whose enlightenment you have posed it. You will have seen and heard and thought many things along our analytic path, but not all of those will ultimately warrant becoming part of your findings. You may need to set aside some of that in-depth “description” so as to ensure that you prioritize your capacity to achieve “interpretation.” The decisions you make about what you aspire to and the groundings upon which you aim to achieve that end create a foundation for the manner in which your analytic process will transform data to become the eventual written report.

### *Setting Your Sights*

Sandelowski and Barroso’s (2003a) taxonomy of qualitative findings provides a useful device to remind you that there is a range of possible outcomes for what your study findings could look like. Based on numerous systematic observations of a wide body of qualitative health research, they characterized typical and borderline cases across a continuum of distance from the data. Acknowledging that some published reports exist that are really not research, in that they merely report data, they identified four kinds of research products that are consistent with the kinds of findings one might aim for using an interpretive description approach.

At the most concrete end of Sandelowski and Barrosos’s spectrum of viable qualitative findings, “topical survey” is depicted as an inventory of the topics that were covered by the study participants in response to the researcher’s questions. While this kind of study report might be more accurately described as a form of conventional descriptive research, it is conceivable that a researcher might use an interpretive description lens to inform the inductive reasoning that goes into generating findings within the previously determined organizing categories, such as might be the case with qualitative content analysis (Burnard et al., 2008; Hsieh & Shannon, 2005). Moving forward in terms of distance from the data, “thematic summary” represents a somewhat greater degree of transformation and abstraction than does the topical survey, and in some instances the research report reveals an ordered representation based on data groupings and patterns that have been inductively derived as a result of the analytic process and therefore constitute an aspect of the findings. While some thematic summary reports seem to draw on predetermined themes that could have been generated on the basis of simple descriptive analytic techniques, others create a rich and nuanced report that has the flavor and texture of strong inductive qualitative reasoning (Braun & Clarke, 2006).

Moving to a level of greater distance from the data and higher abstraction, Sandelowski and Barroso describe the kind of study they portray as a “conceptual or thematic description” (2003a, p. 913). In this kind of report, thematic concepts exported from external sources or developed in situ from the data reveal

latent patterns that have been discovered within the data through the application of the interpretive analytic process. Finally, the most fully abstracted and integrated of qualitative analytic products yields what these authors have termed an “interpretive explanation.” Such reports contain whole new conceptualizations of a phenomenon. The reports of findings elucidate or clarify thematic linkages within a phenomenon in such a manner that they present it in an importantly new way. This new depiction is not simply an alternative linguistic or contextual variation on what has previously been understood but takes the shape of a meaningful alternative claim that is positioned to advance thought in the field in some specific manner.

Using this taxonomy as a guide to articulating a range of what qualitative findings can look like, the object of an interpretive description study will typically be in the range of a thematic summary or a conceptual description. A report that reflects merely a topical survey will have fallen short of its intentions and could have been generated using any standard content-analysis approach. At the other end of the spectrum, it is highly unlikely that a single, especially smaller, interpretive descriptive study will yield a fully matured and robust interpretive explanation, since the integrity and coherence of an entirely new conceptual angle on a phenomenon is dependent upon a highly rigorous and sophisticated approach to advanced theory testing within the analytic process itself. By understanding how these kinds of research products differ from one another and making an honest appraisal of the level of findings that would be reasonable within an interpretive description study of your particular size and scope, you can orient your expectations within the parameters of what is realistically achievable. This will greatly help you avoid over- or understating the findings that your analytic process has allowed you to formulate and show your findings in a form that is authentic to your audience. Thus, instead of aiming to generate an exhaustive list of all topics that might possibly be linked to your phenomenon, or articulating a radically new metaphoric device with which to reference it, you will be able to keep your sights set on finding the ideal thematic structure that will showcase the main elements of the phenomenon you are studying in the context of their relationship to one another, if not within an entirely new conceptual or theoretical schema.

### *Working the Ideas*

When you can envision the general form within which your eventual findings are likely to take shape, you can begin to develop an increasingly refined set of mental and technical operations to advance your analytic process toward that end. Although there is no shortcut to enthusiastic wrestling with your data, the intricate process of sense-making can begin early and continue throughout data collection and analysis such that the experienced researcher will have

**BOX 9.3 WHO IS WATCHING AND WHY?**

In this study, a library scientist in the USA was concerned that the nature of undergraduate student evaluation in higher education is becoming increasingly data-driven and reliant on individual-level student data for learning analytics. Such practices can be at odds with the longstanding ethos within university libraries to limit the amount of data they collect about student use of materials. Analysis of interviews conducted with students revealed interesting patterns in their comfort level with how libraries used search data. Although they were comfortable with libraries collecting data to improve collections and services, feelings were mixed with respect to search data being used in investigations of criminal activity or national security, and most expressed a preference that their library search data be de-identified and user controlled.

Garipey, L. (2021). Acceptable and unacceptable uses of academic library search data: An interpretive description of undergraduate student perspectives. *Evidence Based Library and Information Practice*, 16(2), 22–44. <https://doi.org/10.18438/ebliip29923>

already considered and discarded or modified several conceptual schemas for aligning the data before entering the final analytic stages of organizing them into findings. This is a highly conceptual process, and when you are in it, you will become acutely aware of the important elements within your data set, the meta-messages that you believe the final set of findings must convey to the reader if the report is to be true to the research, and the shortcomings of the study that will have to be acknowledged in the rendering of the final report. What you are aiming for, therefore, is to generate a kind of conceptual organizing structure within which you will be able to effectively and meaningfully present and showcase the ideas that you are formulating about your phenomenon. Ideally, the conceptual structure you arrive at will not simply constitute the shelving on which you lay out your findings but will become an important part of the display, one that contributes a key element to the larger story that demands telling.

*Cognitive Processing*

Morse (1994) has articulated a useful depiction of four sequential cognitive processes that are precursors to the kind of conceptualization that interpretive description requires. The first is *comprehending*, in which one learns everything one can about the setting or the experiences of the study participants. Morse

believes that this process requires the capacity to hold judgments in abeyance and concentrate on passively absorbing everything remotely related to the situation being studied. From her perspective, this process begins with data collection but continues through the data analysis process as coding and note-making are employed to generate an endless set of new questions that uncover deeper layers of understanding about the phenomenon.

The second cognitive process she names is *synthesizing*. In this process, you merge various instances or events to describe typical or composite patterns within the data. She sees this as a sifting process, in which the significant becomes distinguished from the insignificant and variations within the patterns become explainable. As she puts it, various factors “earn” their way into the data set as the synthesis evolves. Through synthesis, the researcher decontextualizes the processes from the individual instances of them, thereby extracting common features. Morse describes the act of synthesis as one of generating and manipulating speculation, verifying and falsifying elements within it, and selecting, revising, and discarding possibilities.

The third cognitive operation is *theorizing* and developing “best guesses” about explanations. Within this process, additional questions can be asked of the data and considered on the basis of insights from other theoretical or empirical sources.

The final process for Morse is *recontextualizing*, a step within which the researcher articulates that which has been synthesized into a form that is applicable to other settings and contexts. This process brings the purely theoretical back to the practical and permits a full appreciation for the implications of the newly generated knowledge.

Morse’s taxonomy of cognitive operations is helpful in understanding what is involved in the rigorous conceptual work that shapes the eventual findings. Her depiction clearly emphasizes that it is the researcher, and not the recipe, that is driving the interpretive process. However, despite the broad sequential nature of the cognitive operations outlined in this taxonomy, the actual experience of interpretive description does tend to feel much more iterative than sequential. What a schema such as Morse’s provides, though, is a way of ensuring that you are mobilizing a shifting blend of cognitive operations as the analytic process moves from early exploration through to a final coherent conceptual structure. It may not serve as a specific guide to “what’s next,” but it will help you monitor the time and energy you are devoting to the various elements within the analytic process. New researchers typically get bogged down in comprehension (one can never fully know everything after all) or move too quickly into synthesis on the basis of assumptions that their comprehension is complete. The mental attitudes Morse proposes are helpful in steering you back on course if you find yourself off target.

*Testing Options*

As you work your data from pieces and parts into patterns and relationships and toward more integrated conceptual claims and interpretations, you begin to appreciate the value of tapping a range of strategies for discovering which analytic options will be possible on the basis of your particular data set. In many ways, this is like having a large set of building blocks and experimenting with the different ways the size of your collection, as well as the form and structure of the individual building blocks, will enable and constrain what it is that you are going to be able to construct.

An important angle to keep firmly in mind is that your entire study design and research approach have been oriented toward providing you with the conditions that will allow for inductive knowledge development. You will want to avoid the temptation to move too quickly in your analytic process toward deciding on major categories (such as events or processes) and then being tempted to fill in the bits as your ongoing data collection process provides additional material. Such an intellectual process reverses your logic into a deductive approach, which, of course, will become circular and self-defeating because you did not aspire to the kind of study that would justify that form of reasoning. Thus, always guarding against the demon of settling too quickly on answers, no matter how eager you are for project completion, it can be important to repeatedly return to reading your raw data and jotting down new ways of thinking about it into the “blank pages” of your notebook as a device to encourage you to keep approaching the analytic thought process afresh.

If your first few attempts at generating a conceptual structure for your findings yield similar results, it is likely that you have not yet allowed your mind to fully explore alternative ways of depicting structure. On reflection, you may find that you are having difficulty letting go of your disciplinary preconceptions or prior theoretical allegiances around the topic. As a special caution, this issue becomes particularly problematic where the field is dominated by a particularly influential thinker—such as Goffman (1968) on the topic of stigma in illness—or where your research supervisor has already staked a claim upon a particular way of conceptualizing the topic. If, on honest reflection, you really don't have options beyond the existing theories that are already in use, you might consider simply using your inquiry as an explicit mechanism for advancing them so that you can avoid the trap of pretending your findings are entirely original or have derived exclusively from an inductive analytic approach. If, on the other hand, your exercise in generating alternative conceptual or organizing structure possibilities produces wildly diverse iterations, you have an excellent basis from which to interrogate one against another, asking such questions as “What will this structure illuminate that this other will not?” and “What does it mean that certain elements are more prominent in this scheme than in the other?” This

step will allow you to engage in a rigorous process of keeping both (or all) possibilities in play as long as possible. Comparing and contrasting them in this way continues to serve you as fodder for new insights.

Rather than beginning with major organizing categories for your conceptual structure before you establish the smaller ones, it is wise to try to stay deep within your data set as you begin to label and link the various elements. Even if you are not initially seeking formal relationships, you may well find that it is a natural process for your mind to begin to articulate tentative alignments in the form of a range of possible associations between elements. Each new relationship you propose will allow you to raise further questions that will in turn advance your appreciation for the possibilities inherent in the data set. As the pieces grow and become more firmly established in your mind as essential elements that will have to have a place within your overall conceptual structure, you can risk more formal coding and labeling. However, as with premature coding, it is useful to keep reminding yourself that the conceptual label you have designated for each set of similar ideas or themes is merely a device for organizing your thinking to ensure you do not concretize it into a fixed reality before its time. Remember that conceptual labels are mental devices we use to sort and retrieve information and that they can mislead us if we forget that and take them literally. Being willing to suspend committing to a final nomenclature for the parts of your overall puzzle until quite late in the analytic phase will allow you to exploit all of the many new angles of interpretation that will present themselves if you let them throughout the process.

As the conceptual whole of your interpretive description begins to build, it does become important to work out options for organizing the various pieces into coherent groupings and lists. At this stage, it is essential to “try out” a range of organizational alternatives so that you can begin to understand the implications of each for your write-up, for the form that the final findings report will take, and for what you will be able to do with the findings once they have been articulated (Alvesson & Kärreman, 2011; Sandelowski, 2011). You might ask yourself questions like, “What happens if I group what I have in this way versus this other?” or “In what way are these groupings different, and why would that matter?” What you are seeking here is an understanding of the logic model that will guide the structuring of the report of your findings from a particular beginning to a particular end. The ingredients of the story and the sequence within which they are presented will depend upon your capacity to know where to begin and how you intend to conclude. You might consider various options, such as moving within your material from superficial to deep, simple to complex, manifest to underlying, past to present, and consequential to central. In general, an overall structure to the material you will be considering becomes an important element of the conceptualization and will be a fundamental requisite to the successfully executed write-up of your study findings.

## Conceptualizing Findings

A well-integrated piece of interpretive description not only generates a coherent report that depicts and links common elements of an applied or practice phenomenon, but it also becomes a mental heuristic that makes new and relevant understandings accessible to the applied or practice target audience (Broom, 2021; Thorne, Reimer Kirkham, & O'Flynn-Magee, 2004). The ideal might be described as a research report that makes visible and accessible the practice wisdom of a passionate and thoughtful expert practitioner for whom a similar understanding had been acquired through extensive reflective observation and pattern recognition. While theory may play some role in assisting you to come up with such a heuristic, the ultimate purpose is not theorizing but rather illuminating insights that will be relevant to your applied or practice field. Thus, the kind of conceptual claim that you are striving toward may not be highly abstract, original, or metaphoric, but rather one that will powerfully capture the important elements within the phenomenon in a manner that can be readily grasped, appreciated, and remembered in the applied practice context. The level of conceptualization that is achievable within your particular study is something you may not be able to predict until you have worked through the analytic process, and so it is often wise to allow yourself some leeway in determining the ultimate form of your findings until you have established your options. For example, if a fulsome conceptual description is just beyond your reach, then you might do better to represent your findings in the form of a thematic summary rather than stretching credibility by suggesting a conceptual coherence you cannot reasonably justify.

### *The Nature of Concepts*

Concepts are mental devices for organizing ideas so that we can communicate them to one another and build complex bodies of knowledge. They are the foundational building blocks of human organization and allow us to transform the vast complexity of experience and thought into controllable pieces such that they become manageable in the everyday world of discourse and action. The capacity to conceptualize has been described as that which makes us uniquely human and that which allows us to handle knowledge in the manner that we do. We are surrounded by concepts, and they shape the vast majority of what we experience as well as our capacity to reason. We know that they are fluid and socially constructed, and yet they can be remarkably stable and persistent where they seem to fit some important human purpose.

Although we embrace concepts continuously as part of our shared human experience, they do seem to get us into trouble when we try to manipulate them for the purpose of knowledge development. We have very few mechanisms for communicating ideas without relying upon shared conceptual knowledge, and

yet our dependence upon concepts can mislead us into thinking we “know” something because it has been presented in conceptual form. For this reason, many scholars, including qualitative researchers, have fallen into the trap of striving toward creating new concepts designed to compete with the old as a mechanism for advancing new knowledge.

An example from the health domain may illustrate. For many years, the concept “noncompliance” was routinely used to reference the idea that some patients fail to follow the advice of their physician with regard to a medical treatment or health behavior recommendation. Because that concept was understood to imply that the physician had all the right answers and the patient’s role was to passively follow orders, many health scientists and clinicians began to advocate for “adherence” as an alternative concept. While this was a well-intended move, simply changing the vocabulary without tackling the underlying values had very little effect on the original problem and essentially diverted the attention that might have been put toward solving it into debating the relative merits of the two linguistic options. In this instance, revising the concept label did nothing to change the idea, and the embedded structural problem remained quite persistent until an entirely new way of thinking about the phenomenon emerged, complete with its own lexicon. In the world of chronic illness care, “chronic disease management” was juxtaposed with the idea of “self-care decision making” as a revolutionary new approach to thinking about and delivering services. What this example illustrates is that merely fiddling with the packaging of an idea is rarely sufficient to enact any meaningful result in knowledge development, while finding an original conceptual approach that forces rethinking an old problem may in fact be quite powerful.

In the medical world, many concepts are known by the name of the originator (Colles’ fracture, Heimlich maneuver, Alzheimer’s disease). In the social and health care context, the concepts that seem most likely to be understood and taken up in a meaningful way are those that adapt “common” language to clearly communicate a new intent. Thus “patient rights,” “consumer advocacy,” and “informed consent” are the kinds of ideas that develop around a conceptual grounding, allowing us to locate the conversation we are in, to discern the claims that are being made about that concept, and to understand what is being suggested in terms of the relationships that are being proposed between it and other concepts. Interpretive description has the potential to generate new conceptualizations or to inform refinements on the attributes and operational elements we understand in relation to existing concepts. In my own early work with a colleague, we generated the concept of “guarded alliance” to refer to the reconstructed but vigilant form of trust that chronically ill people allowed themselves to form with their professional health care providers (Thorne & Robinson, 1989). Although that research predated referencing the method as “interpretive description,” it was a clear instance of the kind of conceptual contribution

that interpretive description seeks to generate. As an idea, it helps clinicians understand that chronically ill patients who maintain an element of mistrust in their relationships with clinicians are likely protecting themselves against predictable experiences and demonstrating a healthy responsibility for their own well-being. With that idea in mind, you are less likely to be irritated by the scrutiny of your patients and more likely to find ways to celebrate their active agency.

The problem with concepts is that we don't actually control them, but rather they are (or are not) taken up as meaningful and useful for some purpose and tend to take on a life of their own. When an idea finds a receptive audience, it can become embedded in the social fabric like wildfire. Consider, for example, the recent enthusiasm for "sustainability," an important idea that was always there but now seems top of mind in political life and public discourse. The uptake of the concept may well have been facilitated by various influential people and events, but it is also an idea for which society at large was obviously remarkably receptive.

Ownership of concepts—the right to define them and articulate their properties and attributes—is a hotly contested arena. Because they are an important commodity in shaping our collective lives, there is much to be gained by trying to manipulate what is or is not included within the concept and which conceptual relationships will be permitted. Although we scientists spend a lot of our intellectual effort advancing and attempting to control concepts, it is not we who get to determine the impact, but rather this becomes a product of audience reaction. Thus, understanding something of the nature of concepts and the machinations of conceptual knowledge can help you avoid getting caught in the absurdities of definitional wars and instead keep you focused on the larger objective toward which the kind of conceptual knowledge you are hoping to contribute to is directed. In general, we are conducting research because we believe something ought to be understood or handled differently. Whether the invention of an original conceptual label for that phenomenon will or will not effect that change is something we all ought to consider before directing all of our interpretive description aspirations toward conceptual solutions.

### *The Point of Conceptualizing*

Armed with a healthy reverence for the complexities inherent not only in generating conceptually integrated findings but also doing something with them once you have developed them, you may find yourself more appreciative of the usefulness of an artfully conducted thematic summary. Certainly, as an appropriate product of an interpretive description, the thematic summary can offer all the advantages of the conceptual description without the risk of deluding yourself as to the import and originality of your contribution to knowledge.

A good thematic description is distinguished from the topical summary by virtue of the extent to which its organizing structure creates a new conceptualization. Without making claims to the invention of new concepts, the thematic summary can “show” the audience how elements within the larger phenomenon can be ordered and organized to reveal aspects that might have been obscured if presented through any other lens. Thus, the organizing structure within which such a research product is presented can itself be a result of enlightened conceptualizing without setting out to knock down existing concepts or invent new ones.

The core ingredients of conceptualizing are ideas, and the mechanisms with which we work with them are words and signifiers. Thus, as the analytic process evolves, we move from rudimentary groupings reflecting similarities and differences within the data (“Category A” data, for example) toward conceptual labels with the potential to shape the accessibility of those ideas to the eventual reader. It is important to recognize that the labels with which we categorize and handle patterns and relationships within our data set are conveyers of conceptual meaning. Thus, finding ways to further the larger understanding through the syntax of our thematic organizing structure becomes an important way to advance knowledge. By recognizing this process as a conceptual process, and not simply a poetic or catchy set of phrases or a list of themes and categories, we elevate thematic summary to a more meaningful and coherent position.

To illustrate, in a study of oral health care within long-term-care residential facilities, we interviewed and conducted participant observation to try to develop knowledge about how such services worked. In our written report, we chose not to organize our findings according to effective versus ineffective approaches or by specific elements within the service (dental care, everyday hygiene support). Instead, we articulated overarching conceptual structures that seemed to interact to shape the context within which each element became more or less effective (Thorne, Kazanjian, & MacEntee, 2001). In our report, organizing our thematic observations and interpretations using “programmatic strategies” and “organizational culture” as intersecting variables allowed us to advance a conceptual understanding that a variable like oral health care was sufficiently contextually and relationally embedded that the actual mechanism of oral health service delivery was of relative unimportance. Had we attempted to convey these insights in the form of a new concept label or metaphoric representation, we might have completely lost our audience. Instead, from what we have heard, our findings created a basis upon which various care facilities could justify a range of approaches toward meeting their larger care objectives—whether or not they explicitly targeted oral health.

What you are aiming for in your interpretive description is a means for organizing and presenting findings such that something below surface meaning—beyond the self-evident—can be explored and elucidated. You want to show

evidence of alternative explanations you have considered, and you want to ensure that the analytic forms or metaphors that emerge as the infrastructure for presenting your findings are selected on the basis of their capacity to convey an appreciation for the context of the phenomenon, not simply for their effectiveness in turning the data into a good story.

Interpretive description is a meaning-making activity directed at a particular kind of audience (such as applied practitioners) toward the purpose of rendering a new, enriched, or expanded way of making sense of some problem or issue. Although it does not necessarily contain normative components—for there are times when excellent description is sufficient in itself—in most instances an interpretive description product will reflect assumptions about what an ideal future might look like. This is a natural and logical outgrowth of the reality that it originally derived from the identification of a problem in the real world that deserved something better (such as elite athletes with fewer pain problems, newly diagnosed cancer patients with less emotional distress, or classroom exercises with better participation rates). In order to be of excellent quality, it must retain an integrity to that sense of direction throughout the process as well as in the product of the research, such that what it claims to have generated is consistent with the sequence of intellectual activity through which those claims were produced. Interpretive description fails to achieve its potential if it does not extend understanding beyond what was previously understood.

Just as new conceptual labels do not necessarily change meaning, new organizing structures by which to display our material are not in and of themselves findings. They may contribute nothing toward advancing knowledge and arguably can simply serve to further the collective confusion. Findings expressed in the form of what Sandelowski would call “analytic words” (Sandelowski, 2007, p. 130), such as enumerating a list of the categories, themes, and even subcategories and subthemes that have *emerged* from the data set, are essentially making a claim that analysis occurred but revealing nothing by way of actual findings that advance our understanding in new ways. However, when the organizing structure we have created actually showcases the new possibilities we have uncovered through unpacking the relationship between subjective experience and conceptual knowledge, when it illuminates the structure or agency of a phenomenon in new ways, or when it challenges us to think about a familiar issue in a new and more intricate way, it will have achieved our essential purpose.

Through rigorous processes and thoughtful iterative analysis and synthesis, you eventually arrive at your conceptual or thematic apex. With any luck, you’ll be sufficiently confident of one way of conceptualizing your findings in comparison to all other possible options that you can begin to formalize the findings in your written report. By understanding the tale you want to tell, you’ll provide yourself with the explicit blueprint for which pieces and parts will need to be brought into the mix and lined up strategically within a particular sequence so

that you can lead a reader, not necessarily down the identical path you followed, but through to the same meaningful conclusion.

### **Avoiding Predictable Hazards**

Before we leave the subject of data analysis, it may be helpful to review a few cautions. As with all qualitative methods, data analysis in interpretive description poses a number of potential traps into which the inexperienced and unsuspecting data analyst is prone to stumbling. As has often been observed (Morse, 1994; Wolcott, 1994), it is typically much easier to explain what not to do than to fully articulate what to do—at least in a manner that is foolproof! Most experienced qualitative researchers have developed their interpretive instincts on the basis of errors—sometimes hard-earned insights obtained at considerable cost. Paying attention to the patterns of these errors and using that awareness to heighten your reflection at decision points along the analytic path can help keep you from having to learn them the hard way and at the potential expense of the quality of your research product. Here we review some of the main landmines in inductive analysis (Thorne & Darbyshire, 2005) so that, with any luck, you can strategically avoid stepping onto them and reach your destination safely.

#### ***Premature Closure***

Perhaps because the specter of analysis creates such anxieties in the minds of neophyte researchers, a primary threat to meaningful findings becomes stopping at the first major “Ahah!” Once that kind of major experiential insight occurs within an analytic process, it can be tempting to assume that this is all there is and that it is both meaningful and important. Using this first flash of understanding as the basis for making inferential leaps can lead to premature closure on what might be there in the data and prevent you from fully exploiting what you have available to develop the most intricate and conceptually linked interpretations possible (Holloway & Wheeler, 2013).

A second route toward premature closure on what you see in your data comes from what can be termed “overdetermination of pattern.” This can occur when the researcher’s mind creates artificial coherence among data pieces and patterns, often basing those linkages on relatively superficial elements within the phenomenon. If the data seem to “fit” overly quickly, it is most likely that the issues around which they fit will be those that have been primed in your thinking by the literature, your disciplinary orientation, or the experiential knowledge you brought into the study in the first place (Kearney, 2001).

You can prevent premature closure by determining from the outset that you will critically reflect on all possible “solutions” that you may come up with as your mind engages itself in the work of making patterns and building

relationships between and within your data set. It is always wise, when you think you have landed on a way of organizing the whole that accounts for the story you want to tell and the variation you want to represent, to challenge yourself with putting that aside until you come up with a second or third comparator organizing structure. You will find that, once you can successfully defend the relative merits of the choice you are making against equally plausible options, you come to “own” it in a way that will give you confidence through the remaining aspects of your research process.

### *Misinterpreting Frequency*

A second kind of interpretive error is the assumption that, if things occur often within a data set, they are necessarily more relevant or important than things that are less common. Although we all recognize that counting is not the mainstay of qualitative inquiry, attention to frequency seems wired into our habitual ways of interpreting the world. In much of human discourse, we frame our meaningful communications within the context of socially constructed frameworks and rule sets, and being able to distinguish the medium from the message is an essential element of transforming data into findings. Picking up on an earlier example, if, in response to the greeting “Hi, how are you?” most of your study participants respond with “Fine, thank you,” the uniformity of that response tells you considerably more about societal expectations than about their actual state of health. The terminological choices with which people describe and explain their experience are shaped by numerous predictable and unpredictable sociocultural factors and are also highly dynamic over time. My own research team’s experiments with keyword analysis in qualitative inquiry have convinced us how exceptionally context-dependent language can be, such that focusing on it can detract from a more integrative sense of meaning (Taylor, Thorne, & Oliffe, 2015).

The opposite kind of interpretive error is that, having encountered one particularly graphic instance of a thing, you assume it probably happens often, even though you haven’t actually seen any other cases within your sample. This “trick of the mind” may reflect an unconscious attempt to ensure that your findings extend beyond what has previously been reported and are truly original and novel. While a surprising bit of data is well worth careful attention, and working at it analytically may lead you toward new ways of thinking about relationships within the data, it is always important to interrogate yourself honestly with regard to what you would need to do, see, or learn in order to be able to extend the observation into something worthy of the status of “finding.” Here, you may find that the professional literature, your practice expert community, or additional theoretical sampling can provide insights as to the relationship between your case and others, helping you move beyond mere hunches and into the realm of findings that have greater solidity and credibility.

Yet another variation of the frequency problem is the assumption that, because you haven't seen something, it doesn't exist. As you exploit data for patterns and relationships, you begin to become painfully aware that your data set likely does not include all of the possible variations that you hoped it might, and that the better you understand the data, the more complex the problem of variation becomes. Here too, the applied professional context within which your study question has arisen becomes an excellent resource for "keeping you honest." In the end, you will want to ensure that the manner in which you articulate your findings and express your conclusions is nuanced appropriately in relation to the degree of certainty you can reasonably have on the basis of having done a study of the nature and scope of your interpretive description.

### *Overinscription of Self*

As was discussed in Chapter 3, a number of analytic problems can occur if you aren't careful about the extent to which you, the researcher, have "become one with" the data. While your engagement with study participants has undoubtedly created the context within which excellent data could emerge, the extent to which this represents skilled interviewing, the study participants' relief at being heard, or perhaps some other dimension of your interaction with them can be difficult to tease out. Because you may be learning intimate details about amazing lives, it is tempting to think that you have been entrusted with data that are especially rich by virtue of the special relationships you have formed with your study participants, and as a consequence, you now feature as an important part of the story.

Although human interaction characterizes the environment in which data are obtained, apparent self-absorption (or what Sandelowski and Barroso (2002) have termed "hyper-reflexivity") will detract dramatically from the credibility and impact of your findings. It is therefore a good idea to poke a little fun at yourself if you find you are starting to take yourself too seriously and to find safe and friendly critical self-reflective strategies for keeping yourself out of the way of your research.

Each of these predictable hazards can lead to a misrepresentation of meaning that could seriously complicate your capacity to arrive at credible and meaningful findings. When you get to the analysis stage, therefore, it becomes especially important to afford yourself the luxury of stepping back from time to time, creating some distance from the process, and taking advantage of every opportunity to challenge the intellectual linkages you find yourself beginning to formulate. You might find it useful to read in more detail about the typical analytic traps into which researchers fall (Baker, 2006; Silverman, 1993; Thorne & Darbyshire, 2005) or compare notes with others who have experiential knowledge of the analytic process in an applied qualitative study. What you are trying to do is keep yourself honest and keep the analytic momentum moving forward.

## Moving Forward

While data analysis is a complex and difficult challenge—one of those experiential aspects of life that you cannot truly appreciate until you have been immersed in it—it is important to remind yourself that it is entirely manageable and that there are countless strategies you can employ to ensure that it goes smoothly and well. A basic understanding of what it is that you are trying to accomplish and a good reading knowledge of a range of possible analytic techniques are foundational to the process. Even before you are ready to admit to yourself that you are in the analytic mode, your mind will begin to draw linkages between data bits and insert theoretical propositions upon what you hear and observe in the field. By ensuring that you employ techniques to catalyze—rather than replace—your critical thinking capacity, you will find that the mind is the ultimate location for excellent inductive reasoning and conceptualization. Through iterative listening, observing, writing, thinking, listening, writing, thinking, and writing again, you will find that data begins to take on shape, patterns and relationships form, and the possibility of meaningful and grounded conceptualizations draws closer. By engaging your mind and having fun with the interpretive description analytic process, you make that goal your reality.

It is sometimes difficult, especially for the inexperienced, to read the signals accurately as to whether you have arrived at a sufficiently strong analytic foundation to be able to write up the findings. What you are seeking is the capacity to use your conceptual or thematic structure in such a manner that it guides your decisions as you sequence material and select which angles to emphasize and what illustrations to profile. You want your organizing structure to answer such questions as “What belongs where?”, “How much detail is needed?”, and “Which aspects of the issue at hand should I document, and how do I most effectively present them?” As a general rule, your analysis has reached an appropriate conclusion when you can not only articulately and credibly generate a detailed “table of contents” depicting the major headings and minor subheadings that will shape your account of the findings but also argue (or write) a convincing introduction to the findings that explains why the material is organized in the manner that it is and by what logic the reader will be helped to access it. When you have accomplished this step effectively, it becomes apparent which elements of your total body of raw data will have become relevant, where and how they have meaning, and to what use they will be put. With the outline of the portrait making explicit the features it will include, you are ready to begin to paint the picture.

# 10

## WRITING FINDINGS

### **Setting the Stage**

Beginning to write your findings is among the most exciting and daunting steps in any research project. It is a stage you have imagined from the beginning—envisioning brilliant textual excerpts framed by elegant narrative and spiraling into breathtakingly novel and compelling conclusions. Needless to say, although writing the findings is quite different from the drudgery of writing up a literature review or the hard slogging of articulating the nuances of your methodological strategy, it typically tends not to “flow” in the manner that one might have imagined. There is an art to the writing that requires both patience and discipline, and you may make several false starts before you find the approach that will work for you and serve the demands of your particular research project.

### ***Judging Your Readiness***

Readiness to write is among the difficult judgments that a newer researcher has to make, and it is made all the more difficult by our human differences relative to any disciplined process. As was suggested in Chapter 9, it is preferable to wait until you can enthusiastically defend the organizational structure that you have built upon your conceptualization of the phenomenon in question before you begin the writing process. However, many writers don’t quite realize they haven’t fully grasped the implications of that structure until they actually begin to write it. So thinking about the writing and conceptualizing stages of your research as yet another iterative process can help to prevent discouragement.

Sometimes you'll have the advantage of an audience to which you can present your tentative findings prior to writing them. Many researchers create self-imposed deadlines by submitting abstracts to conferences or offering to share their findings with colleagues before they are fully solidified. You can turn this to good advantage if you test out an organizing structure that you can envision and defend, and you can also invite explicit critique into the aspects of the whole that seemed not to "hang together."

Readiness to write is another element of research that is strongly influenced by your basic characterological makeup. Some of us are naturally more hesitant, recognizing that we'll never have all of the answers, and others leap ahead blissfully confident that it will all come together nicely. Knowing your own characteristic style, and ensuring that it works for you instead of against you, is central to your maturity as a researcher. For neophytes, colleagues and supervisors can often be your best source of guidance as to whether you are the kind of person who needs to be pushed or restrained in order to achieve the optimal balance for your project.

### *Deciding on Structure*

There are two basic ways to present interpretive description findings, and which you choose will typically depend on the balance you have achieved between description and interpretation in conceptualizing your findings. The first is to organize the findings within an overarching conceptual claim, the elements of which become the organizing structure for the pieces required in order to understand the whole. The second is to recognize that, if you don't have a conceptual argument of sufficient potency to become the findings, you will need to set up a sequenced organizing framework that will not be the story in and of itself but will allow you to tell the story. Knowing which kind of report you are aiming for becomes important in generating the detailed road map for writing that you will need to keep you honest.

Understanding the nature of that overall organizing structure will also guide you in your decisions as to how you will work with headings and subheadings in order to bring your findings to life. If your powerful message is the larger conceptual one, then the sequence and syntax of the various headings must communicate that conceptual meaning clearly and articulately. If the organizing structure is functioning more as the platform within which the true findings will be showcased, then it can be a mistake to be overly flowery or metaphoric in your headings, as those props will compete for attention with the central characters. As Sandelowski puts it, you need to understand whether your organizing structure ought to be emphasizing "character, scene, or plot" (1998, p. 377). As an aside, I'd also suggest that understanding the nature of your overall structure should also guide you in the eventual selection of the title for your work. Some

very good studies have been disregarded for having identified themselves with a level of conceptual abstraction that they could not sustain internally. So, what you are seeking is a match between the form of the findings and the conceptual level implied in the title.

I would not recommend that anyone begin writing interpretive description findings without a clearly articulated outline. For those who think best in concept maps, the form of that outline may be a visual representation (such as bubbles and arrows, layers, or concentric circles). However, for most of us, there is no better structuring system than the good old-fashioned table of contents outline format. Given that (in most instances) you will likely have to write the findings section or chapter in word sequences that require one sentence before another, paragraphs in some logical order, a beginning, a middle, and an end, it does make sense to meticulously organize that sequential order before trying to enact it. You may still modify it along the way, but once you have laid it all out in writing, your modifications can take into account the implications for the entire journey rather than simply looking as if you wandered off course.

In general, perhaps because of the limits and peculiarities of our human minds as they try to grasp complex concepts, a set of findings tends to be most typically organized into a “handful” of major groupings (such as four ways of responding, six distinct kinds of experience, five steps in a process, or three overall patterns of interaction). If you find you have too many or too few “major” groupings, you may want to ask yourself whether you have fully concluded your conceptual process, whether there is another step in the synthesis that you might strive toward, or whether there are additional structural alternatives you might still consider. Many neophyte researchers find themselves wanting to argue that they can’t possibly break up what is a “whole” experience into component parts and therefore resist attempts to articulate structural groupings. While we might sympathize with the sentiment that human experience is holistic in nature, that particular argument fails to fly when it comes to writing a research report. You actually do need to order and organize parts of a whole in order to build a sequential argument that will allow your reader to follow along with your reasoning and come to the understanding you intend. No matter how passionately you argue that your particular phenomenon defies structural definition, your reader still needs to grasp the relevant bits in some logical order in order to accept what you conclude as a whole. So, thoughtful decisions as to how you will structure the parts of your findings for presentation are an essential element in effectively conveying your newfound insights in written form.

When you have in your mind the appropriate set of component parts—those major groupings that will form the organizing structure for your findings write-up—you will need to express them in words. In the world of applied research, where the findings are intended to be usable, the syntax of your headings may well determine whether and how your findings are eventually taken up

and used to inform practice. Recognizing this, Sandelowski and Leeman (2012) strongly encourage expressing these organizing ideas in the form of thematic statements rather than mere categorical descriptors as the most effective communication device. Showcased prominently as the organizing structure for your findings presentation, thematic statements cue readers quickly and efficiently to what sort of conversation you are drawing them into, rather than forcing them to try to extract those meanings from the data presentation narrative alone.

It is also important to recognize that, whatever form or style of word label you choose, the way your headings are expressed will have to relate to one another (i.e., reflect the same grammatical style, a similar level of abstraction, a parallel kind of conceptualization) and they will have to appear in some kind of logical sequence. There will always be a first section, then a second, and so on, and your decision as to this sequence should not be arbitrary. (The exception of course would be some form of purposefully interactive virtual presentation modality, in which the possibility of infinite sequence is built into the access design, but I will leave that form of presentation for others to consider). In the textual form findings presentation, it is useful to think of yourself as telling a story and needing to find a logic with which to justify what is the best place to begin, what will happen along the way, and how it will all end. The table of contents style for the writing blueprint remains the trustworthy companion to most skilled writers because it lays bare the groupings, allows you to “massage” the labels by which you will represent them, and forces you to come to grips with the sequence with which they will be addressed within the writing. From this comes the insight to know just how each section ought to be written, how much depth and detail should be included, and which ideas will be best left for later. A structure that ultimately supports your understanding of the intricate interrelationship between each of the tiny component parts within the written product is the one that will differentiate excellent writing—and a good read—from that which doesn’t quite meet the mark.

Although some research write-ups may not appear to require formal structure beyond major groupings (the page restrictions of many scholarly journals precluding excessive use of subheadings), longer reports (such as dissertations or monographs) will most certainly require an overt organizing framework that includes more than one layer of structure. And whether the subheadings actually appear in the eventual written text, it is important to extend the planning exercise as far into the structural detail as possible. When the major groupings are articulated in a form and sequence that will serve the whole, each must be considered for its own internal structure. Each will have its own component parts, and they too should be sequenced and labeled (the label being less essential if you don’t intend to use subheadings, but equally integral to the writing blueprint nevertheless).

As a test for the effectiveness of your writing outline, it can be instructive to go back to your data before you begin to write. As you review and reread text,

you will be asking yourself whether you can distinguish between that which is central to the argument you will be building, that which is contextual, and that which is sufficiently peripheral or distracting that it will not find its way into the final text. Where you encounter bits (such as case exemplars of a key element) that you know will simply have to find their place in the final write-up, you will want to easily determine where they ought to be located within the whole in order to attain the best effect. It is the capacity of your structural framework to organize you in the process of writing that will ultimately also determine its ability to inform your reader.

### *Determining a Writing Style*

Writing well is a fundamental competency within all qualitative research (Wolcott, 2009). We have all read a great deal of research reporting by the time we come to do it ourselves and typically will have formulated some impressions of what our own findings write-up will look like. We may have a favorite author whose style of writing we intend to emulate or a voice within our head that has been pressing for expression. It is wise to pay attention to those preferences and impressions as they are likely to find expression even when we aren't explicitly giving them permission. For most of us, writing involves a cacophony of urgent voices all wanting to find their way onto the page in some manner or other and requiring some kind of choirmaster to bring them all into harmony. If you ignore them, they tend to sneak in on their own in a less controllable manner than if you befriend them, so self-knowledge becomes an important part of managing your writing process.

Writing an interpretive description allows you to be somewhat more creative in your writing than your research proposal will have permitted, and yet finding the balance between scholarship and creativity can be frustratingly complex. When you allow your creativity to flow with excess profusion, perhaps waxing poetical or invoking the heights of passion in your writing, you jeopardize your ability to sustain credibility. Conversely, if you write up your findings in a dry and technical manner, very little is likely to excite your reader sufficiently to grasp the importance of your message. Because the purpose of your study, in most instances, will have been to illuminate certain elements of human subjective experience for the purpose of expanding the capacity of a practice discipline to solve problems, you do want to find approaches within your writing that will showcase the message and bring it to the attention of the intended audience. No single writing style can possibly serve all of the various projects that might warrant interpretive description (Sandelowski, 1998).

The form of your research report will most likely include some combination of narrative and exemplars from your data set. Thinking through how you will tackle this and coming up with an approach that will effectively serve your

needs does require some planning. It goes without saying that data do not “speak for themselves.” We have all heard presentations by neophyte researchers who have abdicated their analytic responsibility and chosen instead to simply share with us snippets of text—verbatim quotes from their favorite study participants and so on. If data spoke for themselves, research would be redundant, and we would not have to bother with method (Thorne & Darbyshire, 2005). Just as a journalist has a clear agenda in choosing certain persons to interview, selecting sound-bite phrases to quote, and placing the report within a particular current context, research is also strongly associated with a particular social role, process, and expected product. The data you have harvested and conceptualized are privileged materials, obtained on the basis of a social trust as to how they ought to be used and within the context of a particular academic or practice community. It is your obligation to continue to steer the process through to its logical conclusion and to use those precious data thoughtfully and defensibly as you ground your empirical claims within them. So regardless of your sentimental attachment to your study participants (and all qualitative researchers feel that), the report of findings will be the product of your logic, grounded in the data you have co-constructed, and presented to the audience you intend to enrich with your contribution to knowledge. You will draw strategically upon excerpts of the data to illustrate the points you are making, but it will be you who is deciding which points deserve a place in the written report and why.

When you have accepted the mantle of responsibility for the structure, process, and form of the research report, you come to appreciate that your logical reasoning becomes the thread of argument that must align the entire presentation. You have to know where you are going and why, how to signal your reader as to where you are in the journey, when you have come to a transition point, and when you are nearing the end. You will generate the narrative that glues the entire write-up together and provides the fabric within which the textual excerpts, verbatim quotes, or case examples become the decoration. For this reason, it is essential to (at least theoretically if not literally) separate out the narrative from the illustrative elements in your writing. While the final report may reflect a blend of you speaking and your study participants echoing your statements in their own unique voices, it is a good practice to begin by writing the narrative first and then later weaving in the examples. This way, you allow yourself to “see” the overall flow of logic, stay in control of your sequence of ideas, paragraph structure, and linkages, and really position those examples, when they do find their way in, to the best advantage. I often encourage graduate students to put their data bits aside temporarily as they approach an initial draft of the narrative. This allows for a really thorough development of the whole, tests out the logic model you have constructed, and frames the entire written report convincingly. It turns out not to be too difficult to then go back to the data bits, so you can sort through and organize the marvelous examples you intend

to include in an informed manner and massage them into the narrative at the appropriate juncture. What you'll typically find is that you have far more wonderful examples than you can appropriately accommodate, and so you'll need to decide which best serve the argument. More about that later.

It tends to be a terrible idea to begin the other way around—starting with collections of examples and trying to line them up into a coherent argument after the fact. In most instances, the astute reader can see evidence of that error in the research report, and you might place yourself at risk for what Sandelowski and Barroso (2003a) would term a “no findings” study. While seasoned researchers may well be able to combine writing narrative with selecting examples in an initial draft, those newer to the process will find it well worth separating those two distinct intellectual processes so that each achieves clarity of purpose, and together they make for a stronger whole.

## Engaging in the Process

### *Finding Your Writer's Voice*

A major challenge that many researchers confront when they finally sit down to begin writing is deciding the “voice” with which they will write. Beyond fairly straightforward decisions as to whether you'll permit first person (the alternative being to reference yourself as “the researcher”), you will be trying to find the writing tone and form that will authentically represent your motivation, do justice to your findings, and “speak to” your eventual reader. Your sentence structure, the words you choose, and the manner in which you make explicit the logical flow of your thinking are all elements of the way you interact with that reader and convey what will be read as credible or not. Thus, your writing tone becomes a significant part of your responsibility in leading your project toward its successful conclusion. Being overly flippant, judgmental, arrogant, emotional, or self-absorbed can all be the kiss of death to your eventual effectiveness. So you are trying to convey something of yourself, your process, and your reasoning without hijacking your project.

Although the mind of the researcher is an integral element in the conduct of an interpretive description study, repeated reminders of that within the written report tend to distract the reader from confidence in the ultimate product. Constantly referencing what “my participants told me” tends to make the report just a bit too precious to be believable; instead, you will want your reader to understand you as an instrument for the study rather than its primary focus. While it is your logic that will direct the structure and process of the narrative, you might keep your personhood at a discreet distance backstage, only allowing yourself to peek out temporarily where there is some aspect of the narrative, such as a particular contextual insight, that simply cannot be told in any other way.

Effective writing tends to be fairly simple and straightforward in structure and relatively accessible in its terminological choices. There can be a great temptation, as you are seeking entrance to a new scholarly community, to effect language and writing structure that seem more sophisticated, worldly, and obtuse than what you have previously used. As Sandelowski reminds us:

Whereas quantitative researchers may turn off their readers with jargon high on statistical, but low on clinical significance, qualitative researchers may offend with turgid prose, seemingly endless lists of unlinked codes and categories, dangling participles, and dizzying arrays of multiply hyphenated and, sometimes, nonexistent words that convey nothing more than the writer's willingness (albeit unintended) to destroy the English language.

(1998, p. 375)

Saying things in a more complex manner than is necessary and using obscure language merely obfuscates your purpose and tends to make your reader suspect thesaurus addiction rather than cleverness. The point of your research write-up is to excite the intelligence and imagination of your reader toward better understandings of a phenomenon you thought sufficiently important to warrant the effort of a research study. And so a writing voice that will be effective toward that purpose, one that appears to effortlessly guide your reader along a path of logic and insight whose outcome is the conceptual knowledge you have attained, is the kind of voice toward which you ought to be aiming. Once you have the basics of style and structure mastered, it is most certainly possible to dress it up a bit with your own particular brand of flourish, but do ensure that you are building creativity upon a solid foundation of good writing. If you look carefully at the writing of the scholars you consider your best virtual role models, including those who seem to be exemplars of “beautiful rendering” (Sandelowski, 1994a), you will notice that underlying their distinctive styles is mastery of the basic tenets of grammar and composition. Similarly, summarizing what makes a qualitative written report both appealing and convincing, Jonsen, Fendt, and Point (2018) argue that persuasive findings tend to demonstrate the key ingredients of rhetoric, craftsmanship, authenticity, reflexivity, and imagination.

### ***Strategizing the Use of Exemplars***

As you think back to the purpose of interpretive description, you'll recall that it is not simply to uncover marvelous stories of human experience (for any qualitative method or good storyteller can accomplish that) but primarily to generate a species of knowledge that captures commonalities within human subjective experience at the same time as it allows us to think about individual variation. We develop general knowledge, not because it represents truth, but because it

allows us to grasp and communicate about patterns within human behavior more effectively and allows us to make better-informed decisions about the individual cases that we will encounter professionally. For applied qualitative researchers, this principle becomes particularly important in the selection and articulation of the exemplars (as in verbatim quotes or paraphrased recounting) that you will use to illustrate the narrative argument you are building in your findings write-up, as you will be making your decisions based on an informed sense of your intended audience and professional purpose.

The point of using exemplars in your findings report is never to “prove” your claims (Eldh, Årestedt, & Berterö, 2020). While judicious reference to data examples provides some assurance that the claims you make did actually bear some relationship to the data, the reader essentially has to take much of what you say on faith, since there is no way of truly auditing all that you have done, seen, or heard in the course of your research. Further, even if you were to furnish numerous instances of a particular phenomenon, your sampling strategy prevents you from making the kinds of claims that numeric data imply in a manner that your reader will find justifiable (Sandelowski, 2001). Similarly, although it might lend support to your argument to allude to prevalence patterns within your particular sample, “always” and “never” are unlikely conclusions within the context of this kind of study.

You are, however, trying to help readers navigate between the various kinds of instances that the exemplars within your data illustrate, whether that be a particularly extreme case of a thing or its prototypical illustration. If you understand your purpose to be both the illumination of commonalities and the elaboration of some of the many kinds of variations or diversities that you have observed within your data set, then your choice and presentation of examples will clearly position each within a part of your overall argument. In many instances, researchers begin with describing the common elements, perhaps selectively inserting illustrative quotations or anecdotes chosen to reveal central properties within them, and then proceed to demonstrating some of the kinds of variations that the data set has included. The manner in which you present model examples, contrasting examples, and “outliers” reflects your appreciation for the role each is playing in building the larger portrait of the phenomenon under study, rendering it both understandable through structure and complex through variation. You will want to ensure that this is clear to your reader so that the extreme variation is not misunderstood as common, and vice versa.

The best examples will typically be those that not only show the point you are making but also do so in some utterly human and interesting manner. However, you will need to be careful that you don’t overly rely on any one particular study participant, especially if that participant might be distinguishable to the reader by virtue of expression style or context. Whether you present these exemplars verbatim or paraphrase them will largely depend on how effectively the actual

words and expressions will have captured the meaning you intend to illustrate. People typically do not express orally what translates easily onto the written page. You might feel confident that something was “said,” but find that you can point to no specific sentence or paragraph in your interview transcript in which that idea was neatly conveyed in totality. In general, use just the amount of illustrative material that you need to make the specific point you are presenting. Too much detail raises additional questions in the mind of the reader and can derail you from the specific point about which you are trying to be convincing. Where the words themselves are awkward, disjointed, or trail off, you may find that paraphrasing (reporting that someone said something instead of quoting the exact words) may be more effective. Unless you build in a great deal of context, your reader will not be as attached to the individual personalities of your study participants as you likely are. And so you are trying to be coolly objective in choosing the material and exemplars that best illustrate your findings, not those that democratically represent your original sample or your experience in gathering data. Finally, do remember that the transformation between spoken word and written text requires that someone impose punctuation and sentence structure upon it. The reader needs to “hear” it through a written structure that is intelligible, and it is your job to render it into that form.

### *Making the Audit Trail Accessible*

Because the procedural elements involved in generating an excellent inductive analysis are quite difficult to capture linguistically within a written report, you’ll need to ensure that you have provided sufficient guidance for the reader to distinguish between that which you are describing and that which you are interpreting. In some instances, you may find it appropriate to be explicit about your interpretive approach, but in most cases, overattention to your own intellectual processes, rather than the bases upon which they have been developed, is a mistake. What you are ideally aspiring toward is an elegantly presented flow of logic, effectively illustrated with sufficient samples from the data set to show the genesis and evolution of that logic. In other words, you guide your reader along the trail rather than spending your time making assurances that it exists.

Emden and colleagues remind us of the “moral imperative placed on the researcher that makes honesty and prudence in their publications as significant as the findings themselves” (Emden et al., 2001, p. 210). When you write well and have access to a wide range of data bits within which to ground your case, you actually have a range of options for the presentation of your findings. If you become overly invested in a particular metaphoric representation or conceptual image, it is often quite possible to dredge up sufficient instances that “might” be representative to write up a case that looks convincing. This is why it is essential in interpretive description to maintain an integrity of purpose in both the

doing and the writing—so that the product of your efforts can be taken up in the manner you intended, entered into the ongoing knowledge dialogue within your applied field, and put to some use in solving human problems. If you find that you are “using” the qualitative research enterprise to serve some other purpose, you may have disserved yourself and your profession.

When an interpretive description not only illuminates some aspect of human experience that had been less visible or even obscured previously, the criteria by which the quality of the product will be judged will depend upon the reader’s capacity to follow the design choices you made, the manner in which you enacted them, the sample to which you had access, the data you extracted from that sample, and the sense you made of that data. Following the audit trail does not require reporting the minute details of each of these elements (or qualitative research could never be disseminated in a 15-page manuscript). However, the logical association between each element and all others must be convincingly apparent in the written report. The reader who understands the ingredients of a qualitative product must be able to see evidence that you gathered data in a particular manner and that you systematically reflected on those data until you were able to articulate a meaningful way of explaining their core elements. You will convey this through your language selection, the way you link ideas together, and the integrity of the explanations. When the reader can see that the product is well made, the findings reflect credibility. Thus, much of your capacity to make visible the logical path you have followed throughout your entire applied research process rests with the conceptual structure and narrative form within which your study findings are made manifest.

### **Pre-Emptying Predictable Problems**

To further complicate the writing process, there are a host of avoidable difficulties that are worth mentioning as you strategize your writing process. Depending on the type of written product you are generating (e.g., a brief journal report or a much longer doctoral dissertation), you’ll want to familiarize yourself with the form within the genre and the general expectations or requirements that may constrain your options. In most instances, you’ll find that you can work within a fairly broad range of formats. However, a journal whose manuscript requirements insist that you articulate the hypothesis being tested may pose a real challenge!

### ***Misusing Metaphor***

Although most interpretive description does not seek overarching metaphoric representation of phenomena as its primary objective, the use of metaphor is undoubtedly an important mechanism for articulating interpretive material.

It permits us to explain one thing in terms of another, elucidating elements in relationship in a manner that may be quite difficult to communicate otherwise. However, if metaphor is to be used in the writing, it is essential that it be handled thoughtfully and intelligently (Sandelowski, 1998). Metaphors privilege certain angles of vision and even values about a thing (and in the qualitative health research world, it seems they are more popularly used to make inferences about heroic acts, objects of beauty, or wonders of nature than to characterize defeat, decrepitude, or turmoil!) (Thorne & Darbyshire, 2005). The slanted perspective that a metaphor suggests can do injustice to the totality of an inherently complex phenomenon. We might find it morally satisfying to claim that breast cancer is about spiritual growth, for example, but for many women, pain, disruption to normal daily life, and threats to mortality still take precedence. In writing about metaphoric representations in qualitative reports, Sandelowski reminds us that “Metaphors are supposed to make things cohere: to link the parts to a whole” (1998, p. 379). Mixed or aborted metaphors therefore detract from coherent rendering. An overstretched metaphor becomes absurd, while one that is underemployed becomes relatively meaningless. Metaphorically speaking, should the “balancing act” become an “obstacle course,” we will have lost the capacity to “harvest the wisdom” it was intended to nurture!

### *Descriptive or Analytic Excess*

Lofland and colleagues (2006) have pointed out that both description and analysis (interpretation) in excess can detract from the quality of a qualitative research report. And it is in the showing, rather than the telling, that this becomes visible. For example, some qualitative researchers cite Clifford Geertz (1973) to justify the inherent value of “thick description,” even when their reports actually reflect large quantities of the more “thin” variety (Denzin, 1989; Sandelowski, 2004a). As Wolcott has commented, this all too often takes the form of “heaped data” (1994, p. 13), from which the reader is expected to draw their own conclusions.

The opposite problem is also the case in qualitative reports where analytic procedures are themselves reported as findings (Sandelowski & Leeman, 2012). Where there is too little description to support the interpretation, the treatment of data can become the primary focus of a research report. Write-ups structured around lists of processes, themes, categories, or dimensions without showing what connections there might be between them or how they might contribute to some larger whole will not have met their objective and may reflect the author’s conviction that their own thinking, and not the phenomenon at hand, is at the center of the inquiry (Sandelowski & Barroso, 2002). In essence, we are seeing the undergarments, rather than the *haute couture* they were meant to support.

### ***Conceptual Confusion***

To this point, we have not addressed the issue of bringing ideas from the literature into the written report of findings. This too is a matter of preference, with some scholars choosing to generate findings prior to discussing them on the basis of the available literature and others choosing to integrate the two operations. For the purposes of this book, I have chosen to separate presenting findings and interpreting them within different segments of the write-up in order to better frame the distinct approach you will bring to each. Because generating a written report of findings and critically interpreting its central claims in the light of extant knowledge are distinct intellectual operations, I tend to encourage newer researchers to keep them separate until they know how their own thinking patterns will be influenced by the attempt to combine them. In most instances, even when a final written report effectively reflects a blend of the two, one mental operation will have preceded the other in arriving at that integrated product.

Where literature is brought into the presentation of findings, however, it is of utmost importance that you avoid slippage and drift with your conceptual representations. Regardless of how your write-up has been organized—whether around a conceptual description or a thematic summary, for example—you will have used conceptual language in your interpretive synthesis of findings. Once having done this, you must remember that you have chosen words and phrases to denote ideas, and it is the ideas that remain the important elements in your findings. Because you may well have selected terms that distinguished what you were doing from “common” language within the field, your terminological variation is not in and of itself a finding. Instead, you have an obligation to pay serious attention to the ideas that other authors have been trying to express in using their particular terms and not read any undue relevance into the similarities or differences inherent in how they expressed it. Further, if you have capitalized on a conceptual term to reflect a core element of your findings synthesis, then you no longer have license to use that same term as it would be used in common parlance. In other words, once you designate a central authority to a particular term, you can’t change your mind and have it mean something different.

### ***And a Word about Writer’s Block***

I would be remiss if I did not mention that the complexity that is original scholarly writing, especially when it represents the culmination of a piece of research into which you have placed your heart and soul, can lead some of us to the condition that is commonly referred to as “writer’s block.” It is well recognized that writing at this level and toward this purpose is hard work, and that feeling you have hit your limit and cannot proceed is not uncommon. Numerous guides and texts are devoted to helping writers write, many of them aimed at audiences in postgraduate education or scholarly/research careers (e.g., Adams, 2019; Janzer,

2016; Rocco & Hatcher, 2011; Silvia, 2018), and invariably they discuss writer's block as a challenge that many of us face.

The key to understanding and overcoming writer's block is to acknowledge it, shift it from being a shameful secret into a somewhat predictable problem for which there will be a solution, and to be kind to yourself as you work out how to move beyond it. Ask colleagues and others who write or do research how they have coped with it, and you will be impressed by how common it is, even among seasoned and skilled scholarly writers. Further, you will be impressed with how creative your colleagues (and those who write about writer's block) have been in finding solutions. As with anything, there is no remedy that works for all of us, so experimenting with different strategies can be helpful. Sometimes it is a matter of working out what time of day or week is optimal for your writing time and reorganizing everything else to accommodate that (instead of vice versa). Sometimes it requires that you be more creative about undoing ineffective practices that may have contributed to your writer's block. If you keep being distracted by other things to do on your computer before you can possibly begin writing, you may have to force yourself to remain seated, on the appropriate screen, and turn off all interruptions. If, on the other hand, you are exhausted from focusing on the writing you cannot do, you may need to allow yourself a strategic break time (a night out and away from your computer, an actual vacation time away from home) in order to regroup your thinking and energy and come back at the problem refreshed. Perhaps you would benefit from "writing retreats" with a few colleagues to encourage one another, debrief writing challenges, and provide encouragement. The possibilities of how to do things slightly differently to see if they begin to shift that blockage are endless. But most importantly, don't assume that a writer's block is an indication that you are less worthy than others, that you cannot succeed, or that you do not belong in a research career. Learn to normalize this as you likely do so many of the other nuisance avoidances and procrastinations that we all have as part of the human condition, and use your creative skills to solve the problem.

Although the issues described above are by no means an exhaustive list of the hazards to avoid in your writing, thinking about these issues should orient you to the purpose that is driving your study, your options for conveying to your eventual reader the passion and enthusiasm you have for your topic, and the technical strategies by which you will optimize the successful report of findings. Although one can say a lot about how and how not to write, in the end it is the attitude and application of the writer that creates the written work. Remember that it takes patience, practice, and persistence. Writing qualitative findings is quite a different form of writing than any other. It takes a serious investment of yourself, engagement of your conceptual mind, and the ability to step outside your embedded perspective to appreciate the manner in which your writing will be received in the wider world of your intended audience. Mentors, guides, and

editorial critics may well add valuable support along the way, but it is ultimately you driving the logic and determining how best to convey in written form what it is that you have qualitatively discovered.

In the preceding set of chapters, we have focused our attention on the doing of an interpretive description study. Now, as we head into the final set of chapters for this book, we shift our angle of analysis into the larger issues of what it is that the interpretive description means within the wider context of applied and disciplinary knowledge.



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**PART III**

Interpretive Description in  
Context



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# 11

## INTERPRETING MEANINGS

Although completing the written report of your findings tends to feel like closing the curtain on a five-act play (complete with an expectation of joyous applause), there is more to be done before the interpretive description is complete. As with all research, the findings from your study require thoughtful examination, reflection, and reinterpretation within the context of what else is known about the phenomenon before you can legitimately report what it is that the study “means” in the larger scheme of things. In this chapter, we’ll consider the processes of working with your findings: “discussing” them in the context of other literature, drawing conclusions on the basis of them, and considering what (if any) implications might derive from what you can conclude. Each of these requires an understanding of the nature of the practice knowledge world into which you hope your findings will gain entry. The extent to which that is achievable will depend in no small measure on your capacity to step back and appreciate the nature and limits of your findings within that wider context.

### Discussing Findings

Once your findings are neatly displayed in written form, they have taken a shape and structure that permits you to focus your attention on what kind of contribution they might make to advancing knowledge. Having had to draw your written report of findings to a close, you will have found yourself forced to summarize the key messages in your interpretive schema of what you have seen, heard, and thought about the phenomenon in question. Although we tend to use the expression “findings” to distinguish the more descriptive from the interpretive aspects of a study, interpretive description explicitly acknowledges that your

interpretive brain has been in action throughout the process so far. However, in the “discussion” component of a research report, you are adding in another layer of interpretation by taking your thinking beyond what you have gleaned through analysis of your data and venturing toward the more general kinds of claims you will be able to make about what truly has been “found” on the basis of your study. To get there, you will have to make decisions about which of those elements that have been prominent in your findings deserve further examination so that they can be placed solidly within the context of what is “known.”

### *Identifying Priorities*

Although everything in your written report is undoubtedly important to you and an indispensable element of the whole lived, embedded, embodied, subjective human experiences that you have been faithfully recording, some of the ideas will be objectively more “important” than others. Determining which ideas constitute the appropriate level of importance for further discussion requires that you understand the nature of your research question, the knowledge community from which the question arose, the construction of your data, and also the interpretive processes through which you transformed them into findings. In applied research, again returning to that “line of sight” that is guiding you, it also requires an understanding of your intended audience and the manner in which it might or might not welcome the ideas you have been developing as findings.

You may find, for example, that certain of your findings take on importance because they depart in some manner (subtly or dramatically) from practice norms or what the literature might have led you to expect. If this is the case, before determining whether the findings are or are not important, you might need to ask yourself about the extent to which this departure might reflect your sampling limits or the passage of time since the original observations were made and results published. Simply noticing the unexpected does not necessarily make a finding important, since there may be self-evident reasons why your findings and those of others reveal differences. However, where there is no apparent explanation, variance from the expected can lend meaningfulness to certain elements within your findings, including those that may not have been represented as a prominent element within your conceptual conclusions.

The central thematic statements or conceptualizations that represent your findings will usually cue you as to what will be important aspects of what deserves discussion. Certainly, you will want to examine what it means that you may have synthesized component parts into a particular configuration while others observing similar parts may have made different organizational and representational choices. However, if your conceptual thematic statement theme takes the form of an abstraction or a metaphoric representation, then

it is the idea that is being represented that will deserve further attention. For example, if you conceptualized the coming-of-age experience you have been studying as being “like the metamorphosis of a butterfly,” it may not be at all significant that others have analogized it as a flower growing or a package unfolding. Rather, what would become relevant are the key properties, qualities, or elements that each of the interpreters was trying to emphasize in articulating those analogies. As you will find when you go back to the literature with fresh eyes, what authors sometimes claim to be their main finding is more properly understood as the platter upon which they presented it, the serving dish they chose to display that which made it what it was. You’ll want to ensure that you don’t make that error and stay true to the important ideas that are contained in your construction of findings. Discussion time then becomes the opportunity to reflect differently on your findings and understand them in other ways. To some extent, this explains why it is quite difficult to discuss findings at the same time as you are generating the initial written report of them and why most scholars create an explicit temporal separation between the two important intellectual processes.

Diving beneath the signifiers and into the underlying meaning becomes an important part of determining what truly is important and worthy of further discussion to bring your report back into the applied field’s knowledge conversation. You might ask yourself:

- *What are the main messages here for the practice field?*
- *What is it that I know now, having done this study, that I did not know before?*
- *Or, perhaps that I did not know in quite the same way?*

In reflecting on these questions, you might find that you can distill your findings into “thematic messages” that represent the essence of the ideas that you have so carefully documented in meticulous detail as you wrote up your findings in full. While it can be disconcerting to think that you have expended so much effort and come away with essentially a “sound bite,” it can be useful to remind yourself that if you cannot sum up the point of a paper in a single sentence, you may not yet know what the point of that paper really was (Sandelowski, 1994a, p. 376).

Considering your own findings in this light, you will identify a handful of major themes (and by that I mean some kind of manageable number somewhere between two and five or six in a typical study). These will be the ideas you have developed with your findings that deserve further attention and consideration in light of what the audience in your applied field currently understands and, in some cases, what the wider knowledge universe understands. You will need to clarify your thoughts about which you have decided to address in this way and why, and make that logic explicit to your reader. In this way, you are setting the stage for the conversation you and your theoretical reader are now entering.

### *Deciding How to Interpret*

When you bring your findings onto the ballroom floor for their debut performance and invite them to engage with other dancers, you will want to choose quite carefully with whom you wish them to interact. Certainly you will have already gathered a ready troupe of performers for the purpose of the literature review with which you began your study; however, you are also likely to want to seek out new players, the exciting and exotic experts whose relevance has emerged during your absence or whose significance has come into focus because of your immersion in rehearsal. Recognizing that you are looking for different kinds of literature for different elements of the discussion of findings is an important component in thinking through the potential scope and breadth of interpretation that is available to you and that will make sense for your particular study.

### *Revisiting Original Sources*

The “old friends”—those key pieces of empirical knowledge that you will have critiqued and challenged in justifying your study in the first place—have likely been with you, at least in the background, throughout your research process. In fact, recognizing where your observations may have been similar to or different from what they reported may have played a role in shaping what you conceptualized as findings. In general, we do not “find” what we are told exists and predictably observe; rather, we “find” the unexpected, the interpretively distinct, and the deeper linkages, those elements beyond what would have been self-evident or commonly understood. This might explain, for example, why those researchers in a particular era found growth and spiritual transformation among women with breast cancer—not because the threats to femininity and longevity were no longer present, but because they were so strongly anticipated. Remembering this, it is important to be able to dig deep into (and beneath) the minutiae of the findings that have been reported by others at the same time as we take an objective and distant view of their conclusions.

Thinking about the original literature that you reviewed in this manner, you will be able to see options that can take you well beyond the unfortunate and formulaic ritual of reporting whether your findings did or did not “fit” the findings of others. While there may be some occasions when that kind of observation is worth making, it is unlikely to be of any real interest to your reader, and rather than reporting a litany of similarities, you can dispatch with that aspect in a sentence or two (such as “For the most part, the educational barriers and facilitators reported by these study participants reflected the general pattern of those that have been well reported in the literature.”), so that the reader understands whether your findings support, or are supported by, the findings of others. Beyond that, for the kind of applied empirical work that interpretive description

entails, your primary agenda in your discussion of findings is to reintroduce yourself to those original literature sources for the purpose of expanding on, refining, or deepening meaning.

When you return to the original literature, your motivation is to see whether there is anything within your new findings that sheds a different angle of vision on what you thought you understood on the basis of them in the first place. Occasionally, you may find it useful to reflect on individual pieces of that literature one at a time, but more often it is informative to consider the “weight” of the body of literature as it would have oriented you toward various emphases, directions, or perspectives. If you are reporting on aspects of your findings that are distinct from what was previously reported, you’ll need to reflect on whether that distinctiveness is relevant. For example, if you strategically selected your sample on the basis of guidance provided by previous researchers on the important limits of their own, then it may not be of importance that you saw something that they didn’t. Essentially, you and they are in agreement as to what improves the angle of vision, not in disagreement as to what was found.

### *Exploring New Sources*

Ideally, your immersion in an interpretive description study will have resulted in some insights, observations, and ideas that were not entirely anticipated on the basis of your review of the original literature. Indeed, if all there was to find was what one might have expected, then one could question your justification for having done the study in the first place. So, beyond reconsideration of the insights within the original literature on the basis of new angles, nuances, or discoveries that your research process has uncovered, you are likely to want to extend your interpretation of findings into bodies of literature that might not have seemed so centrally important in the first instance.

For those who have firmly located their academic involvement within a specific applied disciplinary context, it can be daunting to have to consider reading outside the discipline. Fortunately for those in the health professions and in other applied disciplines, interdisciplinarity tends to be as fundamental as breathing, and the idea of “borrowing” knowledge from a wide range of disciplinary sources is not foreign or frightening. However, comfort with the idea of engaging in a wide interdisciplinary read does not necessarily translate into figuring out how to thoughtfully embark on it.

It goes without saying that none of us can be fully expert in all knowledge traditions, nor can we fully embody the ideational structures of disciplinary perspectives beyond our own. What we can do, however, is strive toward a reading knowledge of central ideas within other fields and disciplines as they pertain to the substantive issues with which we are concerned. So, for example, where applied social anthropologists are studying the cognitive processes involved in

workers adapting to a new organizational structure, they might well draw upon psychological theorizing as well as applied knowledge in the field of organizational behavior or health care management. If, however, their discoveries have to do with changed identities resulting from these experiences, they might also find important insights in such fields as education or social work, where considerable attention has been paid to the impact of altered life circumstances upon identity. Thus, the capacity to imagine where other scholars might be doing work that has relevant parallels, and from which alternative insights may derive, becomes an important element in what makes a good piece of interpretive description truly excellent. While focused, disciplinary knowledge is a useful commodity and has been powerfully influential throughout the conduct of your applied interpretive description study, the capacity to look into your discipline's inevitable biases and blind spots comes from having braved the wider world of general knowledge. Thus the best of researchers are those who also read, listen, and engage in that wider universe of ideas.

There are many ways in which you can expand your capacity to consider new and potentially relevant bodies of literature, and developing the habit of capitalizing on them is a useful adjunct to your effectiveness as a scholar and researcher. Much research takes place in and around a university context, and universities are hotbeds of ideas and inspiration. By sharing your general ideas and emerging findings with others and explicitly soliciting their ideas about other forms of inquiry or bodies of knowledge you may not yet have tapped, you can signal your enthusiasm to that wider community and increase the likelihood that colleagues will share suggestions, no matter how wild and wonderful they might seem. Although many of us in the initial phases of our research are hoping not to find any more new literature, in these concluding phases the motivation is quite the reverse, and putting out feelers may well yield thought-provoking results. When you present preliminary findings, such as to a graduate seminar or a group of professional colleagues, don't miss the opportunity to ask for ideas as to:

- *What else might these findings mean?*
- *What other fields of study might be addressing ideas that could potentially reflect some parallels or contrasts?*
- *What else do my findings make you wonder about?*

Although the prospect of developing a full reading knowledge of other disciplines keeps many researchers from peeking out from their usual reading comfort zone, there are many efficient techniques for getting an initial "feel" for what might be there. Given a hint of a possible link between your findings and the knowledge that is developing within a certain discipline, it is often possible to locate among your academic, collegial, or even social networks someone who knows something about the area and can give you some starting direction. What

seems self-evident to those in one discipline is often quite foreign to another, so starting up a conversation with the civil engineer who lives in your neighborhood or the botanist who belongs to your walking club may help you find language or reference points about a concept from which you can locate current thinking about particular problems that may inform a human experiential analogy such as tension or equilibrium. Also, don't underestimate the potential importance of that which may be core or basic knowledge within another discipline. If you have uncovered important new insights about the way in which people facing childbirth or terminal illness reference transcendental meanings within their experience, you may find it helpful to understand how anthropology has dealt with the role of myth within culture or the insights that comparative theology offers with regard to human variation in matters of the spirit. Sometimes, an exploration that begins with those "101" core texts within the discipline can orient you to the language, the key thinkers, and the branches of study whose insights may help broaden your discussion beyond the base from which you began. And the ubiquitous Google search (used with caution of course, and never as a final authority) may well open up new windows into how others think about ideas that may illuminate your own.

Another aspect of knowledge that may have been overlooked in your original literature review and that you may wish to bring forward in the discussion is the body of quantitatively derived knowledge that has been developed in your applied field. While you may find the idea of measurement antithetical to the grounded, holistic conceptualizations you are concerned with, what it is that people have found to measure and what they think they have learned on the basis of statistical inference is an aspect of most human experiential fields that deserves thoughtful consideration. As we'll consider further in Chapter 14 when we discuss evidence, much of what we need to know in order to advance the applied practice fields depends upon skillful integration of understandings that are only possible on the basis of the distinct methodological traditions. Those who study individual cases cannot presume to make claims about larger populations, while those who refine the art of measurement cannot enlighten us about the unique and particular. Many of the really important questions actually require both species of knowledge, so in bringing current wisdom from the other side of the scholarly community into the discussion, you begin to see a wider potential for your interpretive description results (Thorne & Sawatzky, 2014).

The new literature that you bring into your discussion of findings offers a real advantage in allowing you to interrogate what you have learned from diverse perspectives and to imagine what might be possible if alternative research agendas were followed in the future. A thorough and critically reflective discussion of this type will often make explicit the possible advantages of following several distinct lines of inquiry as the field of knowledge develops. In enlisting this new literature to assist with discussion of your findings, it is important to

recognize that it was there all along and it was you who hadn't quite noticed. This recognition becomes important in that it shapes the manner in which you reference new ideas—not as support for your findings, but rather as additional angles of vision from which to reflect on the potential meaning and impact of the ideas that you have added. Your discussion might then broaden to a consideration of the potential contribution that might be made by bringing the two bodies of literature together or to the future potential of a reframed research agenda. While this exploration in new literature sources may not yield perfect matches, it does tend to help you move your thinking beyond expansion of your current study and toward being able to envision a more robust and complex program of future research.

### *Extending Interpretation*

In considering the challenge of interpreting your findings, it is useful to reflect for a moment on the larger context of what the term “interpretation” has come to signify within the scientific and philosophical worlds in recent years. Beyond the “interpretive slant” that is inherent in the very idea that knowledge from the perspective of those involved is a worthy objective, there is an “interpretive turn” that reflects an explicit and volitional application of specific ways of handling ideas when we make sense of that human subjective material (e.g., Clarke, 2022). In some scholarly communities, interpretive approaches have become explicitly associated with a postmodernist perspective that may be quite distinct from what you think you are doing with your interpretive description research. Shusterman aligns trends in interpretive theorizing with loss of faith in foundationalism, realism, and objectivity. He notes:

Having abandoned the ideal of reaching a naked, rock-bottom, unmediated God's-eye-view of reality, we seem impelled to embrace the opposite position—that we see everything through an interpretive veil or from an interpretive angle.

*(1991, p. 103)*

This form of interpretation reminds us of the hermeneutic circle in which we come to understand something in a particular way because of who we are, not necessarily because of any inherent or immutable properties it possesses.

As was explained in some depth in Chapter 1, the world of ideas within which the interpretive description methodological approach was developed pertains to informing the application imperative rather than to the primary objective of theorizing. The world of application draws inspiration and often useful insight from its dance with the theoretical world, but at the same time refrains from fully committing to the relationship because the everyday practical problems toward

### BOX 11.1 HOW DO WE LEARN?

Mathematics educators recognize that the development of mathematical modeling competencies at the university level requires a balance between independent student work and instructor guidance. This interpretive description study conducted in New Zealand sought to better understand the instructor's role in finding the appropriate balance for each learner through interviewing students receiving instruction in three different instructional styles. The findings showed that students moved between states of moving forward on their own and being moved forward, and that instructor approaches that promoted independence were best suited to providing opportunities for students to make choices. Non-prescriptive guidance occurred even when the instructor was not actually present, and modeling activities that facilitated self-discovery, creativity, and productive struggle provided the ideal conditions for reducing learner dependence on instruction.

Spooner, K. (2024). Investigating independent student work and instructor guidance for tertiary mathematical modelling activities. In H.-S. Siller, V. Geiger, & G. Kaiser (Eds.), *Researching mathematical modelling education in disruptive times* (pp. 365–375). Springer Nature Switzerland.

which it is directed demand that at least one foot be firmly placed on the solid grounding that there is a “real world” to be dealt with. Because it is a human world, the nature of that real world may be intricately connected with our capacity to know and understand it, but our particular understanding is not the main fascination. What keeps us firmly grounded within what we consider to reflect reality is whether certain angles of vision on issues and ways to think about problems will actually assist us with solving them.

In this context, the “interpretive” world becomes a space within which we can temporarily assume a standpoint and reflect on “what if” we were to gaze upon things from different angles of perspective. By taking on feminism, poststructuralism, or postcolonialism, for example, as the standpoint from which to examine our findings, we may well find that we can expose new questions or sharpen our focus on certain elements. However, these explicitly “interpretive” stances we might play with temporarily will not become our *raison d’être* but rather serve as yet another lens through which our kaleidoscope of insights may potentially be enriched.

One way of thinking about the role that interpretation plays with interpretive description is to consider an important distinction between interpretation and explanation. Although we may use the two terms in a similar manner in the

colloquial sense, it is helpful to distinguish explanation as the understanding of causal antecedents and interpretation as delineating the context that may help us understand why something occurred (Roth, 1991). While explanation creates the means of prediction in relation to something like human behavior, interpretation simply helps us better understand the “reasons and rules” surrounding it. The interpretivist world, therefore, “looks for culturally-derived and historically situated interpretations of the social life-world” (Crotty, 1998, p. 67). Debates abound within the literature as to the attitude surrounding how culture and human experience interact. For example, according to Crotty, symbolic interactionism considers culture as the matrix that shapes our lives, while phenomenology recognizes it as giving entrée to a comprehensive set of meanings while simultaneously blinding us to “an abundant font of untapped significance” (p. 71).

Because interpretive description research locates itself so as to recognize the powerful influence that social, structural, cultural, and historical contexts of human experience have on what we know, experience, and think within applied fields (Garrick, 1999), it seeks to understand how that context plays out in individual experience to the extent that it can be known and acted upon. While it uses human experience as its starting point, it is not constrained from considering other dimensions within which that experience may be situated. Thus, it seems necessary and relevant to include within the full interpretation of findings those “explanations” and interpretations that may shed light on what influences are shaping the circumstances and how they may be interacting with one another to mold the manner in which people live and interpret their living. Thus, the bodies of literature within which these interpretive angles of vision are developed and explored may well be a useful additional source of inspiration for interpreting findings. At the very least, they keep us alert to the context within which our evolving knowledge must reside.

## Drawing Conclusions

Although there will have been concluding elements to the final paragraphs of your findings write-up, these are somewhat different from the ideas that you can fully justify as the actual “conclusions” of your study. Because interpretive description generally taps human experience in context, with the inherent limitations that implies, it is essential that you engage in a distinct process of reasoning before you can generate the “so what” of what you have been studying.

The simple way of saying this is that conclusions are a product of study findings interpreted in the context of the available literature. What that means, however, is that you have recognized the inherent limits of knowledge derived exclusively from the specific perspectives you have had access to in your study, regardless of how meticulously and exhaustively you may have documented them. Understanding that any single study can only permit a narrow range of

conclusions helps you understand why the broadest form of discussion with the literature provides an advantage.

When your findings have revealed elements that have never been reported elsewhere, and your search has been sufficiently extensive and diverse to allow you to claim that authentically, then there is little you can conclude other than that the idea may warrant further investigation in future studies. Unless you can substantiate your suspicion with other empirical work or clinical literature, for example, your conviction that the phenomenon you observed is generalizable in any manner would have very little credibility as a formal conclusion. However, what you can do is articulate concluding ideas about the relevance of what you have observed in the form of consequent questions that deserve further consideration and future inquiry. For example, having documented virtual bonding behaviors in relation to text message sharing among your sample of otherwise hostile young offenders, you might ponder, "Could this provide some insights into possible options for relational practice with this population?" Alternatively, you may be able to articulate a conclusion in the form of a somewhat vague and imprecise expression of a theoretical possibility arising from your observations that warrants consideration. For example, on the basis of your findings associated with the emotional accounts of individuals recovering from hip-replacement surgery, you might conclude that they "*may* experience a form of existential vulnerability that interferes with their ability to fully engage in exercise therapy."

This form of tentative wording approach allows you to keep in play those informed suspicions you may have formed about phenomena, and at the same time not denying the possibility that your observations may have been an artifact of your particular study at the place and time it was conducted or of your own particular slant as the interpretive instrument. Expressed this way, your conclusion conveys the direction your interpretation is heading without misrepresenting the extent to which you can convince the field of its broader applicability. As you express the limitations of your study, you will be mindful of the possibility that your perspective may have been influenced in certain ways, such as by particularly vivid and compelling accounts within your data set, that led you to explore more deeply for this aspect of the phenomenon or some unique aspects of your engagement with study participants that might account for a difference between your sample and a more general population. Aligning limitations with your tentative conclusions, you can demonstrate further lines of reasoning that could be fruitfully followed in order to deepen and confirm the beginning insights that have arisen within your study context. "Is it possible that the bedside exchange of information among the inter-professional care team at your hospital unit has increased the likelihood of heightened preoperative fear?" "Is the passive aggressiveness you observed in your practice setting something that might be common to a wide range of health conditions rather than particular to this patient population?" Thus,

your capacity to read and inquire broadly, to ask questions about what else might be like the phenomenon you observed, or who else might have made observations that resemble what you have documented in some manner, will help you put some perspective on whether your research product constitutes a potentially useful applied or practice observation or a profound and groundbreaking new discovery.

Although these kinds of tentative “wonderings” may represent the limits of what you can reasonably conclude on the basis of your study, especially if it is a smaller and exploratory one, interpretive descriptions can also produce highly credible and defensible conclusions. In cases where you can deeply interpret your findings in the context of significant bodies of literature, especially where such bodies combine robust empirical and theoretical literature, the fruits of your interpretive description may be considerably more amenable to strongly articulated concluding claims. What you are stating, in coming to such conclusions, is not what the world knows now as a direct result of your singular study but what the results of your study, viewed in combination with a particular body of knowledge, allow us to be relatively confident about and to understand in a particular way. Confirming that what has already been well established also applies to your particular sample is not in and of itself terribly satisfying, but locating your findings within a larger context can create a solid platform upon which you can justify the particular extensions, elaborations, and enrichments that your study findings contribute. Generally, the more intricately linked your data elements, and the more coherently articulated the relationships between them, the more likely you are to use literature to your advantage as a basis upon which to articulate credible conclusions. Further, among the more important kinds of conclusions you may have come to is the recognition that knowledge relying upon other angles of vision (such as quantification or clinical wisdom) may reveal some important blind spots and limitations. Your most meaningful conclusions may be those possibilities that you make visible by virtue of the particular approach you have taken to surfacing the kind of knowledge that disciplinary practitioners sense and human experience confirms.

Finally, in articulating conclusions, it is useful to remind ourselves that interpretive description makes no claim upon “truth,” and conclusions deriving from it must always be expressed in a manner consistent with that understanding. Unlike other forms of science, within which “certainty” represents a shared understanding that there are immutable facts, even as imperfect as our capacity to know them may be, interpretive approaches at best produce knowledge claims that are inherently particularistic, relativistic, and evolving according to changing circumstances (Forbes et al., 1999). The conclusions we draw on the basis of our interpretive description research, therefore, must always reflect a respect for the context within which they were derived.

### **BOX 11.2 WHERE CAN THEY GO?**

Recognizing that physical activity is a result of many interrelated factors, including the built environment, researchers in Hong Kong, where dwelling space often precludes physical activity, wanted to better understand how community-dwelling older adults navigate community space in order to achieve the physical activity required to maintain health. Using geographic information systems to visualize and analyze special dimensions of the elders' physical activity routines, as well as interview data to capture the complex cultural meanings and interpretations that affected their human and place interactions, these researchers documented the creative ways in which these elders created their own space in places such as footbridges or children's playgrounds proximal to their home locations, as well as features such as bars, handrails, and fence-like structures to create space for their habitual exercise behavior.

Lee, J. L. C., Guo, Y., Lo, T. L.T., & Ho, R. T. H. (2022). Prisoner and creator of space and place: An interpretive descriptive QGIS study to understand exercise experiences of community-dwelling older adults in a low-income neighborhood. *Journal of Aging and Environment*, 36(3), 274–288. <https://doi.org/10.1080/26892618.2021.1932009>

## **Considering Implications**

### ***Strengths and Limitations***

All studies have both strengths and limitations, and researchers are generally expected to have documented some of each in relation to their particular contribution to knowledge. In attempting to demonstrate critical reflection about these, it is important to ensure that you focus on that which is relevant. For example, explaining that qualitative studies in general (or interpretive description in particular) are inherently limited would be a superficial and self-defeating claim. Instead, you are being asked to critically consider elements within your study that warrant mention for the particular influence you understand them to have potentially had on the data to which you had access, the manner in which you worked with it, and the design decisions that may have played a particular role in bringing you to the findings and interpretations you ultimately arrived at. These might have to do with sample population, the nature of the study context, the means of data collection, the timeframe over which you constructed data, what else was going on in the world concurrently that may have shaped the experience of those you were studying at that time, and so on. In considering what you might express as limits to your own study, it might also be instructive to reflect

on what limitations (or constraints) may have derived from your application of disciplinary logic throughout your study (Thorne, 2020a). Might there have been aspects you prioritized that have obscured other elements? Might you have overlooked certain kinds of data in your analytic sorting and organizing process? Or might you have delimited your interpretations of what you deemed sufficiently relevant to warrant inclusion as findings on the basis of what you believed your intended audience would most easily understand? You may also find evidence of relevant limitations in the ideas you included in your initial intellectual scaffolding for your study. Did some of those ideas drop off the map in a manner that might have shaped the study? Or did some of them play a sufficiently influential role in your thinking that it is worth acknowledging the manner in which they could have limited your access to other angles of interpretive vision?

Although humility with respect to your study's limitations is important to demonstrate to your audience that you understand what it represents (Thorne, 2016), it is also fair to comment on what you consider to be particular strengths. In most of our research and applied practice contexts, it is wise not to seem to overstate this aspect, as that tends to trigger critique. Instead, aim for a balanced and thoughtful commentary on what stands out as particularly influential in your capacity to have generated the findings in the manner that you did. Avoid trying to claim "firsts," as being the first study to have done something is not in and of itself relevant or meaningful (despite the frequency with which you see "firsts" reported in the literature). Ideally your statement will demonstrate that you are capable of a credible assessment of the nature of the contribution that you have been able to achieve with this piece of scholarly work.

### ***Implications for Further Research***

In keeping with the scientific tradition in which it is embedded, one in which the thirst for knowledge is understood to be infinite, all research ends with a consideration of what the next logical steps might be if we are to advance knowledge in this field even further and explicitly what is it that the new study has contributed that may inform future inquiries. Your interpretive description is not complete, therefore, without some mention of what future research might arise on the basis of what you have learned in the course of your study.

In general, the very weakest suggestion you can propose is that someone ought to replicate your study in a larger context or with some different features to the sample. While this may well be your own aspiration, replication, in and of itself, is not a justification for further research. Recognizing the interpretive tradition within which you have conducted your study, it actually makes little sense to suggest that someone could start where you began and think the same way you did about the phenomenon of interest given new material. Consequently, starting your discussion of implications with a replication recommendation flags to

your audience that you may not be thinking deeply about what it is that you have produced or what implications it might really have for further inquiry.

What becomes a more convincing argument in favor of future research is the specific questions you have brought into focus and curiosities you may have inspired through your thoughtful interpretation of your results in the context of the wider body of knowledge and practice understandings. Where your study has revealed a new dimension of a phenomenon, an alternative conceptualization that ties together elements that were previously understood as merely coincidental, another layer of experience that has not yet been fully developed within the practice field knowledge, then you have a powerful basis upon which to make recommendations for further studies. What ought to guide you, however, is the original research problem with which you entered the field: What did you think needed to be known, and who needed to know it? Orienting your future research recommendations around the larger aspirations of that original applied question will allow you to articulate the potential role of this study within what could become a much more vigorous, focused, and productive program of research—a challenge that you yourself might take up or one toward which you might invite your audience.

The most useful recommendations will be those that reflect awareness of the limitations of your study approach and the advantages that other methods or designs might afford. Thus, rather than encouraging your practice community to focus its attention on interpretively oriented inquiry, you will have made a much more important contribution if you can suggest various angles of the overall problem that might strategically be addressed using the full range of inquiry approaches. The point, after all, is meaningful knowledge, and in the world of practice application, that will always and inherently mean population-based generalizable knowledge in tension with individually oriented experiential and interpretive analysis.

In many instances, the database you will have constructed for the purposes of your research will have angles unexplored and depths untapped as you have focused your attention on the aspect that your research question directed. At the point of completing your study, you have an intense and immersed knowledge of what is there and what that kind of engaged, interactive data collection approach can yield. Thus, another element of your recommendations for future research may well revolve around related questions that you now believe ought to be asked, either of your data set at a later time or by future studies more specifically directed toward the topic. As many researchers working in the field of qualitative and interpretive inquiry have observed, the rich content inherent in so many databases would provide an important comparator for later secondary analysis so that the implications of the historical context in which it was created can be illuminated with the informed perspective of time (Mottier, 2005). In proposing such future possibilities, you are doing justice not only to the conclusions you

were able to reach but also to those that you may have realized were beyond your grasp because of the context and conditions of your study.

### *Implications for Everything Else*

In the world of the applied disciplines, it is almost inevitable that a research report will go further than simply recommending future studies but will also comment on a range of other recommendations that derive from having done the research. Because the practice mandate is the “so what” of the applied world, reporting back to your professional community what you think ought to be done differently in such domains as education, practice, service delivery, or even policy seems essential. It is important to remember that, for the non-applied disciplines, making recommendations for action on the basis of a single study would amount to heresy. And this attitude of humility will serve you well in addressing the matter of implications if you keep the inherent limits of your interpretive description study firmly in mind.

That said, you will likely believe that there are some aspects of your study that those in your professional community really ought to understand so that their practice can be more sensitive, better informed, or increasingly thoughtful. You may even feel that the insights you have uncovered are of such importance that they ought to be taught to new practitioners or embedded within the policy frameworks where their work will be conducted. While your enthusiasm may be commendable, try to avoid the temptation to use your study as a platform from which to argue all of the opinions and preferences you have developed in the course of your professional career as a vision for a better world. Although those passions have their place and deserve expression in the appropriate venue, suggesting that they have now been rendered “evidence based” by virtue of your interpretive description could well inflict an injustice upon the credibility of the qualitative inquiry genre.

# 12

## ENHANCING CREDIBILITY

Although a concern for credibility has been embedded throughout the previous chapters in relation to each element of the research process, here we reflect upon qualitative research credibility in the larger context of applied disciplinary knowledge. Interpretive description seeks access to an important kind of knowledge about human subjective experience. However, we must remember that its products are not inevitably accurate, relevant, or even necessarily socially responsible, and the knowledge deriving from them will be no more or less credible than knowledge derived from a range of alternative sources. Thus, it is essential that we have access to thoughtfully developed quality criteria to assist with both reading this kind of research and guiding the conduct of it (Engel & Kuzel, 1992; Kuzel & Engel, 2001; Morse et al., 2002; Tracy, 2010).

Interpretive description was specifically designed to address what had been identified as an epistemological confusion within the qualitative health research field that appeared in the form of weak or ambiguous methodology resulting from an incomplete shift from a quantitative to a qualitative philosophical orientation (Burns, 1989; Leininger, 1994). This was particularly the case in the context of the inappropriate application of quantitative quality measures to what ought to have been recognized as an entirely distinct epistemological enterprise.

The ideas contained in this chapter draw heavily on a previously published examination of options for understanding and judging quality within the constraints of the qualitative traditions and how we might distinguish mediocrity from excellence (Thorne, 1997b).<sup>1</sup> In that earlier writing, I tried to synthesize accepted approaches to qualitative credibility to show how various scholars had tried to translate the imperative of the quantitative “holy trinity” of reliability, validity, and generalizability (Kvale, 1995) into a more compatible philosophical

orientation. I used that synthesis as a basis from which to consider the difficulties associated with articulating a methodological “gold standard” within qualitative research in general and tried to extract some guiding principles that could be developed into a mechanism for a comprehensive critique of the quality of qualitative research products. It was my hope in that work, and remains my hope today, that we can find ways to articulate the intricate blend of artistry and the science that interpretive description represents, and thereby render that distinctive perspective increasingly meaningful within the evidentiary context of our practice disciplines. As Elliott and Williams have so eloquently expressed it, “The ultimate paradox is that qualitative inquiry is impossible—both conceptually and practically—yet it still goes on. It must do so if the professions ... are to advance” (2001, p. 181).

### Quality Considerations

Leininger’s classic attempts to distinguish critique from evaluation (Leininger, 1968, 1994) position critique as the product of a review by someone of recognized authority rather than a matter of comparison against some general evaluative standard. This view assumes the value of applying the critic’s “areas of expertise, intellectual astuteness, and philosophical commitments” to the quality judgment (Leininger, 1994, p. 98). However, assuming the imperative that we find mechanisms beyond the stature of an individual critic to decide upon the quality of a work, a more salient approach to credibility assessment would include elements of conventional evaluation to detect evidence of theoretical strength and extend upon that with some form of critique such that the nuances and qualities beyond mere competence also find purchase within our quality considerations. From this angle, critique of qualitative research blends knowledge of the evaluative criteria of qualitative research with a solid foundation in the disciplinary domain for which the knowledge is claimed, combined with the skill set of critical judgment (Berkwits, 1998). Just as the sommelier commands an intimate knowledge of the technology and the artistry of winemaking in order to appreciate subtle distinctions that would escape an ordinary wine drinker, an expert critique of qualitative research demands broad knowledge of the substantive field in which the research attempts to gain acceptance (Parse, Coyne, & Smith, 1985).

Despite the emphasis on the stature rather than the ideas of the critic, Leininger’s perspective effectively orients us to a kind of evaluation that extends beyond adherence to a set of external standards for methodology and toward a more grounded appreciation for the nature of the knowledge toward which the methods are applied. The importance of extending traditional evaluation into the domain of a more subtle critique can be illustrated with reference to qualitative inquiry within the health sciences. The health disciplinary researcher who

presents qualitative research findings to an audience of professionals in the field understands that, regardless of how carefully the assumptions and limitations are stated, any potentially usable insights deriving from the findings may well find their way into clinical applications. Thus, the quality standards for health science research must therefore be somewhat different from standards in more theoretical fields such as, for instance, literary criticism. Health science disciplines exist because of a social mandate that entails a moral obligation toward benefiting individuals and the societal collective. This factor inherently alters a health science researcher's disciplinary responsibility such that it goes beyond the reach of traditional evaluative criteria and into the domain of how findings might reasonably be interpreted or even used. Thus, an appreciation for the credibility of qualitative research within the health sciences properly extends beyond mere consideration of adherence to the methodological rules and toward examination of the much more complex question of what meaning can be made of the research findings (Angen, 2000; Emden & Sandelowski, 1998, 1999; Morse, 2015a; Russell & Gregory, 2003).

### **Evaluation Criteria**

While each qualitative methodological tradition includes somewhat distinct guidelines by which it may be judged as theoretically, epistemologically, and technically sound, qualitative scholars have synthesized these guidelines into general principles that we can recognize as more or less accepted across the qualitative research spectrum. It is to these general principles that we turn when we consider the kinds of evaluative criteria that are typically applied to the products of interpretive description.

### ***Epistemological Integrity***

First, all qualitative research is expected to demonstrate *epistemological integrity* in the sense that there is a defensible line of reasoning from the assumptions made about the nature of knowledge through to the methodological rules by which decisions about the research process are explained. For the findings to be credible, the research process must reveal a research question that is consistent with the stated epistemological standpoint and an interpretation of data sources and interpretive strategies that follows logically from that question. We are necessarily suspicious of research in which the findings produce knowledge incompatible with the assumptions implicit in the design or knowledge that the researcher was predisposed by prior location or bias to uncover. It is therefore essential that qualitative researchers demonstrate an appreciation of the nature of their epistemological positions and create decisional strategies that respect those positions (Koch, 1995; Simmons, 1995).

### ***Representative Credibility***

Second, qualitative studies ought to show *representative credibility* such that the theoretical claims they purport to make are consistent with the manner in which the phenomena under study were sampled. For example, in a phenomenological single-case study of an illness experience, we would not expect claims about shared elements within the experience. Similarly, where a grounded theory study of a phenomenon reflects the basic social processes of a dominant cultural group, we would not accept inferences that the processes are universal across cultures. We therefore recognize that classic conditions such as Glaser and Strauss's maximal variation (Glaser & Strauss, 1966) are required before certain kinds of knowledge claims can be attempted on the basis of qualitative findings. Study findings based on prolonged engagement with the phenomenon are more likely to be afforded credibility than are those derived from more superficial involvement (Erlandson et al., 1993). To confirm our inherently constructed perception of an event or process, we generally value some form of triangulation of data sources (Farmer et al., 2006). Similarly, to convey substantive completeness, we expect that qualitative researchers recognize knowledge beyond a single angle of vision, as depicted in the crystal images evoked by advocates of methodological triangulation (Breitmayer, Ayres, & Knafelz, 1993; Richardson, 1994; Sandelowski, 1995a).

### ***Analytic Logic***

Third, we expect reports of all qualitative studies to reflect an *analytic logic* that makes explicit the reasoning of the researcher from the inevitable forestructure (Miles & Huberman, 2019) through to the interpretations and knowledge claims made on the basis of what was learned in the research. It is never sufficient for a researcher to assure the reader that an inductive reasoning process occurred; rather, we require that evidence of that logic be made sufficiently visible throughout the report in such a manner as to allow us to confirm or reject its credibility (Morse, 1994). While it is well recognized that there is an inherently emergent nature to good qualitative research (Sandelowski, Davis, & Harris, 1989), the decision-making process used throughout the conduct of the study must be rendered sufficiently accessible that the research consumer can assess its adequacy (Burns, 1989). A commonly applied principle is the generation of an audit trail, an explicit reasoning pathway along which another researcher could presumably follow (Carcary, 2009; Erlandson et al., 1993; Leininger, 1994). Further, the traditional ethnographic principle associated with the value of thick description charges us with crafting reports that ground our interpretive claims in verbatim accounts from our data and make use of such illustrative material in a manner that reveals context (Ponterotto, 2006).

### ***Interpretive Authority***

A fourth requirement is that qualitative studies reveal an *interpretive authority*. While we recognize that all knowledge is perspectival, we need assurance that a researcher's interpretations are trustworthy, that they fairly illustrate or reveal some truth external to their own bias or experience. For example, while we value a metaphor that adds coherence to our understanding of a complex phenomenon, we demand sufficient information about the data from which the metaphor has been generated to be certain that the researcher has not force-fitted them into a convenient structure (Janesick, 1994). In our evaluation of qualitative studies, we need to be confident as to which claims represent individual subjective truth claims and which might be more shared or common in nature. Whatever our theoretical views on the question of generalizability, we must be able to grasp the researcher's intentions in revealing knowledge about the particular. Thus, our reports must account for the reactivity that will occur within the research processes (Zahle, 2023). In some instances, as discussed in Chapter 9, we may build in systems to check our interpretations against those of our research subjects. We aim toward convincing our audience of our version of truth through what Altheide and Johnson have referred to as "validity-as-reflexive-accounting" (Altheide & Johnson, 1994).

The principles we generate to ensure rigor and credibility within our qualitative research processes all derive from an appreciation of the knowledge claims within which a method is grounded and an awareness of the social and knowledge community context into which our research reports will be directed. Taken together, these four principles form the basis for articulating evaluation standards in interpretive description.

### **Beyond Evaluation**

Because we have access to an increasingly sophisticated set of evaluative standards against which research in the various qualitative traditions can be judged, one might be tempted to assume that merely following the guidelines will produce a product of high quality. However, as has been pointed out by several critics, rigid adherence to textbook approaches in qualitative research (i.e., fetishizing method, methodolatry, criteriology) can propagate weakness rather than strength in our research enterprises (Brinkman, Jacobsen, & Kristiansen, 2014; Eakin, 2003; Janesick, 1994; Sandelowski, 1993a; Schwandt, 1996). Here, we are entering the world of a more subtle critique of the products of qualitative research, taking into consideration the larger disciplinary, social, and historical contexts within which they were produced.

### ***Moral Defensibility***

Qualitative research within the applied practice disciplines aims toward knowledge that would eventually influence one or another form of practice (Green &

Thorogood, 2018; Maxwell, 2013). For example, we seek to understand how people experience certain assaults of the body, mind, and spirit not in and of themselves but because we hope to be able to alleviate unnecessary suffering or harm and promote as much well-being as is possible under the circumstances. Consequently, a criterion against which all applied health science research ought to be judged is its *moral defensibility*. We need convincing claims about why the knowledge that we are extracting from people is necessary and what will be the purpose of having such knowledge once we obtain it. This principle, which should apply equally within all practice disciplines, extends beyond traditional ethical claims about the protection of our human subjects and into the realm of an appreciation for how knowledge is used in our society (King, 2019; Traianou, 2020). When we applied researchers do research in sensitive areas (such as communicable diseases, ethnic diversities, or vulnerable populations), we must account for the possible uses of our findings even before we know what they will include (Guishard et al., 2018; Hays & Singh, 2012). Our rationale must link the findings to a potential benefit for those we serve before we will find it defensible to place any marginalized group at risk of social censure or antipathy because of the new knowledge we extract or because of the manner in which we make the knowledge accessible to those whose purposes may be distinct from a humanitarian health care agenda.

### ***Disciplinary Relevance***

As has been emphasized throughout this discussion of interpretive description as an approach to generating knowledge within the applied and practice disciplines, I envision accounting for the ways in which qualitative research findings meet a standard for *disciplinary relevance* as an essential credibility consideration (Thorne, 2001, 2016, 2022b). Beyond the question of whether society requires the knowledge we seek, a critique of our research products properly includes the issue of whether the knowledge is appropriate to the development of the disciplinary science. In Chapter 2, I referred to a case in which a study of career-oriented women with tattoos had found its way into a prestigious nursing journal, provoking considerable negative reaction within the discipline. This case suggested a deeply felt sense that researchers ought to be required to explain the relationship between their research and the disciplinary knowledge they seek to advance before the professions should support otherwise technically competent inquiry.

### ***Pragmatic Obligation***

A third perspective from which the credibility of our research can be considered also derives from the special problems inherent in the practice sciences,

where matters of truth and opinion often become blurred around the edges. Apart from any knowledge claims within a health science discipline, whether they be expressed as limits to generalizability or a conviction about multiple coexisting realities, an agreement about what seems real and valid is a prerequisite to action. This *pragmatic obligation* reflects the inherent tension within practice realities, in which respect for the uniqueness of individuals creates sympathy for an idealist epistemology at the same time that the moral mandate of a practice discipline requires usable general knowledge. Qualitative health researchers cannot therefore put forth their findings with the comfortable assurance that no one will apply them in practice before they become scientifically “proven.” Rather, recognition of a practice mandate demands a position that no new idea should be understood as purely theoretical and therefore incapable of rendering harm. Thus, researchers in the applied and practice fields are obliged to consider their findings “as if” they might indeed be applied in practice.

### **Contextual Awareness**

A fourth domain inherent in an assessment of research credibility is the *contextual awareness* revealed by a qualitative researcher. The epistemological claims within which qualitative research methods are grounded solidly locate the new knowledge within the society that constructs it (Ponterotto, 2006). As Greenhalgh and Manzano (2021) argue, “Contexts are not just things or people (material and social) but psychological, organisational, economic, technical and so on relationships (forces) that interact and influence each other” (p. 590). And as such, they are inherently entangled with mechanisms, including the mechanisms of knowledge production.

Even so, many qualitative researchers seem not to recognize that their own perspectives are inevitably bounded by their historical context as well as by their disciplinary perspective. Developments in the philosophy of science make it clear that we simply cannot see what we cannot yet see. While those elements of our social historical context that are apparent to us can be accessed, bracketed, and interpreted, we must accept the continuing probability that we are as strongly influenced by other yet invisible shared assumptions (as those of us who have lived long enough in the scholarly community come to learn experientially!). Because many of our tacit understandings are social constructions, they are likely to be shared by others in the field and even by those we attempt to study. Therefore, our research always has the potential to re-create those ideas “as if” they were factual (Herzlich & Pierret, 1985). It is, therefore, imperative that qualitative researchers articulate their findings as contextual in the recognition that many supposed accepted realities will not comfortably withstand the test of time.

### **Probable Truth**

Finally, an appreciation for the credibility of our qualitative research products demands a reverence for the ambiguous zone of validity and shared reality known in philosophical circles as *probable truth*. As has been pointed out in numerous thoughtful considerations of what validity and generalizability might mean in qualitative research (Johnson, 1997; Kvale, 1995; Lincoln, 1995), no set of standards against which we measure our procedures and products can fully account for the notions of truth or even representativeness within the real world or ensure complete confidence that any research findings are indeed entirely valid (Denzin, 2009; Maxwell, 2021). In departing from a search for absolute truths, as all but the most rationalistic of researchers must, we accept that there is considerable value in recognition of some kinds of knowledge as probable truth (Johnson, 1996; Kikuchi & Simmons, 1996), or the best that we have available until we are confronted with compelling reasons to abandon it in favor of a better truth. However, we must also recognize that certain kinds of knowledge claims that appear to meet our very best truth criteria may in the end prove untrue (see Wolcott's account of *The Brad Trilogy* (Wolcott, 1994) for an exhaustive treatment of one such example). As Eisner has pointed out, it can be useful to reconstruct our sense of why we do research as an effort not to seek truths but to create meaning, to construct images from which people's "fallible and tentative views of the world can be altered, rejected, or made more secure" (1981, p. 9).

Thus, we arrive full circle in our search for truth standards at the portals of moral defensibility, disciplinary relevance, and pragmatic obligation. A sound critique of qualitative research beyond the surface level of adherence to a set of evaluative criteria will therefore inevitably reflect deep questioning as to why we select certain questions to ask, how we claim the knowledge gained will further certain kinds of meaning, and what might be the implications of acts based on what we have come to believe through the process of research.

### **The Standards Imperative**

On the basis of the arguments presented here, it seems evident that the production of excellent interpretive description, as with all qualitative research, demands the skilled application of fundamental competencies within technique and reason, art, and science. However, it must also be recognized that it is conducted within the context of a proliferation of increasingly sophisticated sets of checklists and guidelines that attempt to delineate the standards against which the rigor and credibility of all qualitative studies might be assessed. Such checklists reflect laudable ambitions within the research community to find mechanisms to make their methodologies accessible beyond those with expertise and to inject their products into the broader knowledge generation context (as we will

explore in more depth in Chapter 14, in a discussion of evidence-based practice in health care). However, despite their occasional utility as a very rough heuristic device to remind us of the domains of concern we ought to include in our critical scrutiny of the worth of a qualitative product, checklists and guidelines do little to ensure the excellence of any specific qualitative product (Denzin, 2009; Russell & Gregory, 2003; Stige, Malterud, & Midtgarden, 2009). Further, they tempt considerable misuse in being mistaken for quality criteria, or, as Barbour expressed it, “A case of the tail wagging the dog” (2001, p. 1115).

It rests with the qualitative research community, including those working within the applied interpretive description approach, to continue to strive toward higher and higher standards in determining what constitutes a credible qualitative research product and what deserves a proper place within the scholarly and professional knowledge base. Although some aspects of what constitutes a high-quality qualitative research product may always reflect matters of what Sandelowski refers to as “taste” (2014), here we have depicted qualitative research excellence in the context of the purposes for which new knowledge is sought, our orientation toward the actual and potential applications of the ideas we produced, and our reverence for the complexities of truth claims within the scientific enterprise. If we are inclined to draw on standardized guides for such interpretive assessments at all, we must remain critical of those that focus on the more technical criteria (such as confirmation of ethics review board approval) or that which is highly subjective (such as the achievement of saturation) and focus more squarely on matters of purpose, process, and context, such as have been addressed in this chapter. And, from an interpretive description perspective, the key to quality will inevitably be found within the internal logic that aligns those three elements into a coherent and convincing account.

In the context of the ubiquity and pervasiveness of current ideas about qualitative research standards, there are a number of predictable challenges that authors of interpretive description studies may encounter when they subject their work to peer review. While thoughtful reviewers try to understand the perspective (methodological or theoretical) that an author is representing and titrate their evaluation accordingly, many of us will continue to encounter the kinds of uninformed reviewer questions (or demands) that can come from a superficial and uncritical application of what are taken as global qualitative research criteria measures. One of the more persistent is the assumption that all qualitative studies require a theoretical framework, a position that interpretive description explicitly challenges (see Chapter 3). Another is the expectation that all qualitative research reports must make a “saturation” claim, a matter that is inconsistent with the epistemological orientation of many of our applied disciplines (see Chapter 5). A third is the claim that interpretive description is really a form of grounded theory, a claim that ignores the deep theoretical foundations of that methodological tradition (see Chapter 1) and assumes that all qualitative reports in the

applied literature that self-identify as having used grounded theory methodology actually represent the real thing (Stern, 1994). I have found throughout my career that providing a credible reference point for the counter-argument you are mounting can go a long way toward winning the debate.

Beyond the specific arguments in earlier chapters that may help you articulate an explanation for why you disagree with the reviewer on any particular methodological point they may have taken issue with, it can be helpful in general to remind them that interpretive description constitutes an applied methodology and therefore has a coherent and comprehensive set of its own evaluation criteria, which may represent a departure from the argument they are making based on familiarity with other qualitative traditions. An explicit reference you can cite helps to confirm that you are not making this up or unmindful of the common conventions. And it is always wise to try to approach the explanation to the reviewer with diplomacy rather than frustration. From long experience, I know that you may not win all of the battles, but by explaining your alternative reasoning within the context of this alternative methodological tradition, you do significantly improve your chances for success. And be heartened by the fact that interpretive description studies now appear in the published body of literature of an extensive range of applied disciplines and practices, so with time, those kinds of challenges may gradually fade away.

As trends such as postmodern emancipatory thought within our research communities and the deconstruction of the conventional distinctions between art and science blur our collective sensibilities around how we know what we know, a solid foundation upon which to articulate the credibility of applied qualitative research products is increasingly indispensable (Morse, 2015a). Despite the many challenges that articulating defensible quality criteria poses, it will always be important for us to find ways to articulate, to ourselves and to our wider communities, how it is that we can distinguish good from bad qualitative research—that which should be taken seriously in the context of our disciplinary knowledge development and that which ought to be left on the shelf to gather dust.

## Note

- 1 Permission to reprint substantial parts of the original has been provided by Sage Publications, Inc.

# 13

## DISSEMINATING FINDINGS

Applied qualitative research, by its very nature, is meant to be relevant to a particular audience. While the written report, in the form of publishable journal articles or reports, is the usual means by which we communicate what has been learned from the kind of qualitative project that constitutes an interpretive description study, you might consider a number of alternative approaches for sharing the insights you have gleaned with your relevant audiences. Because the challenge of knowledge transfer is well recognized as complex within the scholarly and policy communities, it seems important to reflect on how the research you have conducted on behalf of an applied discipline might actually find its way back into the world of practice knowledge. In this chapter, we'll comment on some of the standard approaches as well as some more creative and innovative mechanisms that have been used by various applied qualitative researchers to introduce their findings to the audiences that stand to benefit from them. In the subsequent chapters, we will expand this discussion into a consideration of the larger imperatives of knowledge interpretation, translation, and integration within the applied and practice fields, reflecting on the many ways in which interpretive description can fit into knowledge evolution.

### **Professional and Scholarly Communications**

Most researchers will find the professional and scholarly communities the most obvious first point of communication. Giving some thought to when, how, and why you want to interact with these audiences will help you make effective decisions about what to do with your research findings.

While there is no “right answer” for how to take your findings into the wider domain of knowledge dissemination, it is well worth reviewing some options. The ones that will be best for you will often depend on where you are in your career, what your career aspirations are, and what role your study is playing in the development of that career. While those issues should never be the sole driver of dissemination activities, they do become important considerations. What might be appropriate early in your academic career—when you want to show the capacity to bring a project through to publication for the purpose of establishing your research track record or obtaining tenure—might not be the best option later on when you are concerned with building a comprehensive research program or mentoring junior scholars. Further, these issues shift over time, between disciplines, and in response to a wide range of contextual factors such as the economic drivers for research. It is always wise when setting out in your career to find thoughtful mentors with whom you can have frank conversations about the implications of various choices as you develop your career foundations. Practicalities aside, I would hope that what generally drives your decisions is a conviction about

- *which are the really important areas of study,*
- *which questions within them demand urgent attention, and*
- *how best you might use the privilege of being able to conduct research to make a significant difference where it counts.*

### ***Presenting at Scholarly Meetings***

Presenting your research at scholarly and professional conferences and meetings is a time-honored tradition and primary mechanism for disseminating research findings. Regardless of your field of study, you will find numerous available conferences that invite submission of abstracts and provide opportunities for those accepted to present their work in the conventional oral or poster format or in one of the newer electronic or combination formats. Inevitably, choices have to be made as to which conferences warrant consideration at your stage of career and study progress. A review of some of the key factors you might consider may help you make wise choices to maximize the benefit to you and value to your field of study.

A key consideration is the scope and focus of the proposed conference. While some conferences attract audiences working across a relatively narrow area of substantive knowledge development, others are most broadly oriented to the full range of topics of interest to an entire discipline. Still others attract interdisciplinary audiences, bringing different perspectives to a common concern. Some are targeted toward researchers, while others attract a mix of practice professionals and academic scholars. There may be conferences that are considered

a “must attend” for anyone seeking to develop standing and build networks in your scholarly field. There may be others where you are more likely to encounter practitioners with creative ideas as to the practice implications and uptake of your findings. So a key consideration becomes who you want to be speaking to and what kind of input you might be seeking at this particular stage of your own career development and the development of the scholarly ideas you are building. Often this is where good mentors come in, as they may be able to provide strategic advice as to where the best conversations are being had within your particular applied field.

Given inevitably limited resources, it is important to be thoughtful about which calls for abstracts you will respond to as well as how many you can reasonably participate in. Although travel costs have historically been a delimiting factor, the global COVID pandemic has significantly changed the landscape, such that many local and international meetings are now held in a virtual format (synchronous or asynchronous). And although many scholars have a sentimental attachment to the old world of face-to-face conferences, the costs, carbon footprint, inequitable access, and many other factors mean that virtual conferences will remain a prominent option in many scholarly communities (Sarabipour et al., 2021). If in-person conferences are available and recommended in your particular field, you may want to find out if there is travel funding support available in your institution or program, aligning your abstract submissions with the available resources to support your getting there if your abstract is accepted. It might be helpful to try to obtain an estimate of the likelihood of success with abstract submission. In some fields, conference abstracts are highly competitive with a low acceptance rate; in others, most well-presented abstracts will get the nod. If you really want to be accepted at a competitive conference, you may want to consider submitting multiple abstracts.

Good in-person conferences tend to be expensive, time-consuming, and busy events (often with many participants vying for attention with their own concurrent presentations). While attending a local conference may be more cost-effective, the added benefit of national and international conferences in faraway places is the extended reach of your potential audience (not to mention the possible breadth of learning for you). Ensuring you place your conference investments in the right places is wise. While it is easy to be attracted to the conference being held in some exotic location, do be cautious that you are choosing venues that represent legitimate scholarly and professional options in your field. In recent years, we have seen an increase in market-based conferences targeting potential attendees in email solicitations to events that may sound impressive on paper but lack a significant scholarly or professional basis (Nisha, Das, & Tripathi, 2020).

In submitting a conference abstract for consideration, you will typically encounter a choice of presentation formats. The oral presentation is the standard

mechanism for most scholarly communities—this despite the weight of evidence that suggests it is among the least effective ways to communicate information. In modern conferences, you will often be given very strict time limits, and it is prudent to plan carefully so that you can adhere to them. Going overtime and being hauled off the podium does not lend credibility to your work, and ensuring that you leave time for questions and discussion, if at all possible, is the best way to create audience engagement with your work.

Some people are excellent extemporaneous speakers and can work with slides or minimal notes. Others (especially newer researchers) may do better with a prepared (and timed) speech; however, if you do, try to ensure that you do not revert to pure reading, and practice working from your text in a manner that is lively, accessible, and amenable to engaging with the audience. Audio-visual resources, including PowerPoint slides, can be a marvelous adjunct to oral presentations. Alternatively, they can be frustrating, mindlessly tedious, or distracting. An audience is never impressed by watching you read text from slides. Make use of the many available resources to ensure that you align your audiovisuals with the rest of your presentation, use each element wisely, and understand how to judge the impact of your entire presentation package on your audience. Knowing your particular skills and limitations will help you prepare a successful oral presentation.

Poster presentations are another traditional mechanism for sharing your findings. In general, they afford a more generous time frame in which to engage with members of your audience and allow for more one-to-one networking with those who self-identify as being interested in your topic. You'll maximize these advantages if your poster looks professional, capitalizes on images as well as text to attract attention, and contains sufficient information to explain your work without going overboard with detail. Many poster session formats allow you to share more detailed written reports with interested conference participants and hand out your business card or electronic link for continuing connections. In some conferences, posters may also be combined with brief presentations, such as a three- to five-minute opportunity to capture the essence of your poster orally or options for technology-enhanced communications (Chandler et al., 2013; Gray et al., 2022). The key to a successful poster presentation is to pay careful attention to the format guidelines provided by your conference and to come prepared.

Another dissemination mechanism to consider is the symposium—a presentation option available in a number of conference contexts. A symposium tends to be a collection of paper presentations on a particular theme, developed as a coherent package and structured so as to maximize interaction between presenters and with the audience. While being invited to participate in a symposium in your field can be an excellent way to engage actively with other researchers, designing your own forum and inviting those scholars you'd most like to involve in it is also an option. Despite all of our many ways of creating connection, face-to-face

or virtual human dialogue still creates an important basis for truly productive ongoing professional connections. Thus, choosing the conferences where the right people are apt to be and ensuring that you are as well prepared as possible for the presentation format available to you are key to a successful presentation. And since conference presentations tend to operate on a fixed schedule, they can serve as a convenient deadline against which to build momentum for project completion and finalizing your written report.

### ***Considering Publication Options***

While some interpretive description projects could become fascinating books, and the extended space afforded by the book format would permit the development of a truly in-depth exploration within the research report, the world of publishing today is unlikely to make the book format the preferable choice for most applied researchers. Although they do represent a marvelous tradition within the social and health sciences, monographs reflecting a single applied study are likely to be those that are developed on the basis of larger projects, with extensive sampling, and on topics that will attract general public interest. However, in this case, writing them up “as research” may not serve the marketing needs of the publisher, and so the fact that the findings derive from a rigorous empirical investigation may have to be relegated to the appended material. In general, you would consider publishing in book format when the topic is of considerable popular interest, when you can anticipate a ready market, and when you are not terribly concerned about the opinion of an academic audience. Although there may be disciplinary variation in this regard, the applied health field seems increasingly indifferent to the book format as the appropriate means of communicating research results.

Journal articles are the mainstay of research publication in most applied and practice fields. Over recent years, the number of professional and scholarly journals has proliferated rapidly, and the range of available publication venues means that you typically have numerous options from which to choose. Journals differ in terms of their intended audience, their scholarly credibility, and their prestige value.

At one time, the key consideration in selecting a journal was its intended audience. You decided on the professional group you most wanted to speak to and published in the journal that group was most likely to read, regardless of its reputation or level of prestige. In our rapidly changing information age, however, very few professional and scholarly journals are accessed by individual subscription, and the vast majority of readers will locate reference to their literature sources through online searches and access them through institutional electronic library databases.

In order to reach your intended audience, the more critical factor in the current context tends to be the referencing systems in which your journal is indexed.

While some indexes are discipline-specific, those most valuable for publishing purposes may be the more general ones, which will often be the point of first access for those seeking out literature on your topic. Journal websites tend to list the various databases in which they are indexed, and you can experiment by searching your own preferred sites. Many search sites, such as the U.S. National Library of Medicine's popular PubMed site, publish explicit criteria for journal inclusion.

The issue of journal access is also a dynamic landscape with the rapid evolution of open access journals or open access options within journals. Because open access eliminates the barriers to your audience, it is increasingly prioritized over the more conventional restricted access journal. Some funding bodies require that you publish your findings in an open access venue, and most scholarly and professional journals have transitioned toward complete or partial open access over recent decades. However, the open access environment has also opened up a new wave of market-based, competitive, and often unscrupulous practices. We will say more about that in relation to scholarly credibility.

When you publish, you do want to ensure that your valuable work is located in a venue that will be accessible to the intended audience and will appropriately showcase the quality and relevance of your work. Journals that provide feedback (access and download frequencies) and are indexed in sites that document citations will help you track the effectiveness and impact of your published papers over time. And since all publications do become part of your permanent academic record, you want to ensure you have made sound choices.

An important consideration with respect to the scholarly credibility of the journals in which you publish is whether or not they are "refereed," which refers to the established convention of acceptance based on the recommendations arising from (usually anonymized) peer review. Most academic institutions consider refereed papers to be inherently stronger, in that they have attained publication on the basis of a process that is well understood. However, challenges in obtaining high-quality peer reviews and the potential for errors in judgment or lapses in scholarly integrity have reduced the confidence of earlier years as to the credibility of the process (Lee et al., 2013; Smith, 2006; Tennant & Ross-Hellauer, 2020). For this reason, many journals have started to experiment with open peer review, in which reviewer identities are made known to authors and in some cases published alongside the articles (Wolfram et al., 2020).

Bibliometrics are a frequent consideration for those pursuing research or academic careers in which measures of their scholarly productivity may influence their career progress. Impact factor (as generated by Thomson Reuters Journal Citation Reports [JCR]) reflects a numeric measure of the frequency with which a journal's articles are accessed and cited over a fixed period in time. However, it has become a rather contested issue (Paulus, Cruz, & Krach, 2018). First, as the stringent application and data tracking processes over a significant period

of time preclude access to newer and emerging journals, as well as many of those operating outside established publishing houses, only a subset of journals in any given field will have received a JCR impact factor. Although the presence of a legitimate impact factor rating confirms that certain publishing credibility criteria have been met, there are various ways in which journal impact factor results can be artificially inflated by such mechanisms as editorial policies or the presence of one especially noteworthy paper (Alberts, 2013). Further, since the impact factor can fluctuate significantly from year to year, and in some instances, journals have lost their impact factor due to misconduct, it is unwise to use it as the sole estimate of journal caliber. However, the presence of a legitimate impact factor rating (i.e., from JCR, rather than a fraudulent source) generally does provide some confidence in the credibility of a journal.

Another issue to consider in selecting a journal is its acceptance rate, which is often publicly available on journal websites or various directories. While it can be daunting to submit a manuscript to a journal with a low acceptance rate, the quality of the papers accepted is likely to be higher, and this will be well recognized within your disciplinary circles. So although publishing your research report in the *North Overshoe Winter Chronicles* may be an efficient way to get it into press, it is not going to speak to your audience in the same manner as would a paper in *Science* or the *New England Journal of Medicine*. Since what you are aiming for is likely somewhere in the middle of these polar extremes, you'll want to weigh these factors in your consideration.

In terms of the prestige value and “reputation” of a scholarly journal, a worrisome ongoing issue of concern within the publishing field is “predatory practices” within the open access publishing environment. As open access journals have rapidly become a reputable option across the credible publishing spectrum (Björk & Solomon, 2012; Laakso & Björk, 2012), the potential profit to be made through fee-based publishing has produced a frenzy of new market-driven “scholarly” publishing houses and journals. As this unfortunate trend evolves, publishers are engaging in an increasingly sophisticated array of tactics to recruit unwitting authors and to masquerade as legitimate publishing choices (Beall, 2014; INANE Predatory Publishing Collaborative, 2014). In such an environment, extra caution is required in order to protect your work, and an evolving set of principles and resources is available to support you in that process (Da Silva et al., 2022; Talari & Ravindran, 2023).

Having selected a credible journal for submission of your manuscript, it is important to position your manuscript accordingly (Allen, 2015). All journals have author information readily available, most typically on their website. Pay careful attention to author guidelines for such issues as length, format, and writing style. If the word limit constraints are too narrow for you to do justice to your study, you might search for a journal whose guidelines are more compatible with the products of qualitative inquiry.

In writing up your research, use what you have learned as an informed reader to guide your sensibility about how much depth and detail you can permit yourself within the confines of the journal article format. Although you will never be able to say it all, the piece must say enough to convey the logic and significance of the study in order for it to be meaningful. Many interpretive description studies will be amenable to more than one publication, so if you can't reasonably address all that must be said in a single paper, consider how you might divide up some of the ideas or emphases into distinct but linked written reports. It is never appropriate to "salami slice" your study by writing up multiple similar reports with only minor differences (Smolčić, 2013), and in no case can any portion of a paper duplicate that which has been submitted elsewhere. Duplicate publication and self-plagiarism are serious problems. You would not want your reputation to be tainted by the perception that your distinct products were not original scholarship, and you would never want to put yourself afoul of copyright law. Thus, consider publishing more than a single paper where there are distinct elements or angles to be reported, where a secondary analysis has been conducted on the same data set as a result of the findings from the primary study, or where there is a methodological or clinical application that becomes a meaningful companion to the more formal research report. Acknowledge any previously published papers that relate to the same study with formal citations, and inform the journal editors where there may be any potential overlap to determine how best to reference it.

When writing up your interpretive description report for publication, it is important to acknowledge methodological direction and how you enacted it in your design. Because interpretive description is a logic model rather than a cookbook, you cannot simply reference a source and assume the reader understands what choices you have made and why. In many instances, you will also have drawn upon techniques or processes from beyond interpretive description per se. In such instances, to avoid peer reviewer misunderstanding, I have found it helpful to explicitly name and reference interpretive description as the methodological approach and to note that this tradition is consistent with design options that are "informed by" certain other traditions.

### **Public Domain Communications**

Although many researchers never consider dissemination options beyond the standard "presentation and publication" venues, it is becoming increasingly important that research and the world it presumes to serve are in close interaction with one another. Thus, many qualitative researchers have explored alternative forms of disseminating research findings as a way to inform, educate, and invite a wider community into the dialogue.

### *Arts-based Renderings*

Across the health and social sciences, there has been a tradition of creative representation of qualitative study findings in various artistic formats, including the novel, poetry, dance, painting, sculpture, documentary drama, and theatrical performance. To some extent, these approaches reflect an enthusiasm for modes of representation that depart from those of traditional science, especially where it was thought to misrepresent human experience and, in some instances, reproduce social inequities (Sandelowski & Barroso, 2002). In addition, they have been considered essential to the goal of reaching audiences beyond those who access a scientific format and for communicating those aspects of new knowledge that are difficult to convey linguistically or best experienced in expressive form (Gerber & Siegesmund, 2022; Kwan et al., 2022). In a certain manner of thinking, science and art reflect a kinship in their mutual search for realities that represent forms of truth (Thorne, 1997a). As Sandelowski argues, “Artistic truths are often more true to life than scientific ones, providing us with visions of human nature more resonant with our own experiences than any psychological, sociological, or other conventionally scientific rendering of it” (1994a, p. 127).

A significant problem with artistic renderings, however, is that one faces a considerable challenge knowing precisely what one is to do with them (Morse et al., 2009; Schwalbe, 1995). As a society, we know how to judge the credibility of a scientific product, and we have an entirely different set of assumptions and standards for how the worth of an artistic product ought to be determined. When something straddles that line, the evaluative criteria become much more slippery, such that what might be good theater could well be a misguided interpretation of findings, and so on. Many artistic forms thrive on creating heightened ambiguity and thereby potentially inviting the kind of misreading that might be of considerable concern. Thus, although there is considerable appeal to the idea of experimenting with alternative representations of some of our research findings, such enterprises are to be undertaken with caution and a healthy respect for the rules of engagement with which we entered the scientific endeavor in the first place (Kuri, 2020; McMahon, McGannon, & Zehntner, 2024). The host of epistemological and ethical issues raised by these alternative modes gives cause for significant concern, especially in the context of the practice professions, where such findings were intended to inform our practice. Despite these challenges, there are some spectacular instances of qualitative research findings dissemination in the artistic mode for which there is evidence that the intended message has been handled responsibly (Thorne, 2000b; Gray et al., 2000).

Interpretive description attempts to make visible the commonalities inherent in such complex phenomena as the intricate dynamics of human relationships and the psychological twists and turns that characterize human experience. It also seeks to reveal their variations as different people experience similar situations in different

### **BOX 13.1 ARTS-BASED KNOWLEDGE TRANSLATION**

A Canadian research team wanted to develop better educational materials for parents supporting children with asthma. They knew that arts and storytelling have shown promise in communicating health and self-management information to children and wanted to test out whether such approaches could be used to develop informational tools for parents. Using a multi-stage process, one stage of which was an interpretive description study that captured a hierarchy of the information needs of parents with diverse backgrounds and stages of asthma illness, the team developed an eBook entitled “My Asthma Diary.” This resource incorporates high-quality evidence with insights about parents’ information preferences and needs, integrating the material into an engaging and informative resource. Through sharing the procedural and methodological challenges they faced, the team encourages others toward creative knowledge translation.

Archibald, M. M., Hartling, L., Ali, S., Caine, V., & Scott, S. D. (2018). Developing “My Asthma Diary”: A process exemplar of a patient-driven arts-based knowledge translation tool. *BMC Pediatrics*, 18(1), 186. <https://doi.org/10.1186/s12887-018-1155-2>

ways. Thus, doing justice to the findings of an excellent study within the confines of a 15-page manuscript may feel impossible. In this context, the appeal to explore dissemination methods that afford more depth and more accessibility to all concerned seems a particularly worthy aspiration (Morse, 2000; Sandelowski, 1998).

### ***Engaging the Public Media***

The trick to engaging the public media in disseminating your research is finding a way to create “spin.” Whether it be newspaper, radio, television, or other formats, engaging the media is contingent on developing the art of reducing your research to a slogan or “sound bite” and communicating about it in a manner that is both true to the essence of the work and accessible and interesting to a wide audience. While there may be rare occasions when the media find you, more often it will be you who must do the hard work to build relationships and confidence. Many universities and institutions have public relations departments that are of infinite assistance in helping you learn how to attract media attention, package your ideas in a manner that they can manage, and conduct yourself in a live interview situation. Seek out these resources and take full advantage of them, as working with the media requires a range of competencies, infinite diplomacy, and a dose of hard-nosed persistence.

An important element of media work is timing. While you might want wide exposure for the study you intend to conduct for the purpose of recruiting volunteer participants, your intentions are unlikely to represent the kind of story that would attract media attention. Instead, try to find the angle of your study that will be of general interest, work to reduce it to manageable messages, and find a legitimate way to convey it with a sense of urgency. When you help the media understand your story, assist them to make a report interesting by providing them with real people to interview and factual background information to substantiate your claims, you increase the likelihood of your work being picked up and reported. If possible, also try to align reporting with an event that can engage the reading or listening audience—a controversial public lecture, a new development in service delivery, or an active public policy consultation.

It is also worth mentioning that there are always risks associated with public media engagement. You typically have limited (if any) control over what is done with your material, and once it is in the public domain, it can be widely transmitted without your knowledge or consent. While you can ask to see prepublication drafts or to confirm quotes, these privileges are rarely guaranteed. Your best strategy, therefore, is to be carefully prepared, to provide as much useful information as the situation requires, and to try to ensure that nothing you say or communicate would get you in trouble if taken out of context. Beyond that, it may also be wise to develop a thick skin and a good sense of humor.

### *Using Websites and Social Media*

Many research projects and programs are now finding websites a marvelous way to disseminate study findings. While the internet is increasingly a site of virtual participant observation and research engagement all on its own, it also has tremendous advantages for controlling the information that is disseminated, showcasing varying levels and layers of information depending on self-selected interest, and creating a communication network around your study findings. In a web-based environment, you can engage your audience in getting to know the researcher (or the research team), in understanding the motivation underlying a program of research, and in following the progress of the program over time. While it is typically not appropriate to publish tentative findings in this manner, there is often a considerable amount of information that can be formatted to meet the needs of the professional community and the general public. With the trend toward open-source journals and the proliferation of accessible information, you have expanded options for linkage with other resources, networks, and services through the website mechanism. Thus, your study report can also become part of the larger project of serving the practice communities and the clients of their services that inspired your original research (e.g., Archibald et al., 2018; Ogrodniczuk, Beharry, & Oliffe, 2021).

**BOX 13.2 REACHING THE HARD TO REACH**

E-health has proven to be an effective approach to reach men on health issues. Depression is among the health issues for which men are most difficult to approach. Based on prior studies of men's experience with depression and suicidality, including those guided by interpretive description, in 2015 this team launched a free online resource to offer men information, practical tips, and guidance in recovering from depression. Five years later, they conducted a review to learn who was using this resource and why. The review revealed a high and rising volume of users, global reach, and strong engagement metrics, allowing the researchers to conclude that the capacity for authentic conversations built into the resource design was helping catalyze men's informed mental health self-management and confirming potential for e-health for this population.

Ogrodniczuk, J. S., Beharry, J., & Oliffe, J. L. (2021). An evaluation of 5-Year web analytics for HeadsUpGuys: A men's depression e-mental health resource. *American Journal of Men's Health, 15*(6), 15579883211063322. <https://journals.sagepub.com/doi/10.1177/15579883211063322>

Many researchers have also found social media a wonderful way to bring their findings to widespread attention (Deeken, Mukhopadhyay, & Jiang, 2020). While the drawbacks of social media are well recognized, the advantages in an extensive reach, a “just-in-time” message, and the capacity to engage with those who may not find their way to other forms of research communication are compelling. Because we live in an era of widespread public domain misinformation (Swire-Thompson & Lazer, 2020), including that created by generative artificial intelligence sources (Monteith et al., 2024), readily accessible input from credible researchers and scholars can help to balance the confusion. However, researchers who expose themselves in this manner are also vulnerable to the nuisance or malicious critics, and by positioning themselves in the midst of heated debate, they potentially also contribute to the harms of misinformation. That said, used skillfully, thoughtfully, and constructively, social media offers marvelous potential for public education, immediate engagement with policy-makers, and bringing your qualitatively derived findings to light.

***Wider Community Engagement***

Not to be ignored are the full range of other options that you may have available if you stretch your creativity and think about where people affected by the issues you are concerned with may reside or congregate. In many communities,

there will be various groups of the general public always interested in learning something new from the research community. Assuming your work is in an area of human interest (and almost anything that taps human subjective experience as a source of primary knowledge has potential!), you may well find that local libraries, community centers, faith communities, or service clubs are eager for a volunteer speaker or guest at their meetings. These kinds of community engagements can be invaluable in mobilizing word-of-mouth communication, profiling your work, and even garnering support for your future research. The scholarly generosity they imply shapes the context for future researchers as communities increasingly recognize that the research community has a human face and is working with a range of approaches to solve important problems. There may also be community groups for whom your particular topic is a primary focus of concern. Patient support groups or consumer advocacy groups would be examples of places where reaching out and developing relationships could be of special significance.

In my own work, I have found that speaking to both specific and general community groups often proves multifaceted in its impact. Members of the audience are often surprised that some of the human elements of experience with health and illness are of concern to the professional community and feel energized to hear results that validate subjectivity as a relevant source of insight for health service. Further, I have found such audiences to be an endless source of informal credibility checking, as audience members share with me their own similar or contrasting experiences.

As we move forward into the final chapters addressing various aspects of the “so what” of interpretive description, it is important to keep in mind that disseminating findings, as a time-honored scholarly tradition, will likely always be part of our professional and applied practice activities. However, as is becoming increasingly clear, great studies in and of themselves don’t effect the changes in the field that we all aspire to when we set out on a research journey. We also need to think of them in the wider context of evidence transfer, knowledge synthesis, and implementation science.

# 14

## ADVANCING EVIDENCE WITH INTERPRETIVE DESCRIPTION

Although I consider it something of a misnomer to reference the products of an interpretive description study as “evidence” in the usual definitional sense of the term (Thorne, 2016), I am confident that they can and do play an enormously important role in advancing the nature and quality of evidence from which we are able to draw interpretations about practice and policy decision-making in the applied fields. In fact, because they have been structured from the outset with an organizational logic derived from a question that has come from the practice field as well as design steps that have been justified on the basis of an understanding of the kind of knowledge that field requires, the findings of interpretive description studies more easily align with the wider evidence conversation than do the products of qualitative studies conducted using more conventional methods. However, in order to explain the roles that interpretive description findings might play in an evidence environment, so that we can position our studies in a manner that rings true to the realities of how knowledge works and gets taken up in applied fields, we first need to ground our understanding within the larger contexts of the evidence culture and some of the debates surrounding it, which constitute a somewhat complex and evolving conversation. In this chapter, we will reflect on the evidence culture that has become such a dominant force in health care and other public policy circles, examine some of the challenges around attempts to elevate the contribution of qualitative work within that larger evidentiary conversation, and develop a feel for how and where interpretive description can actually make a meaningful contribution to the knowledge-for-practice enterprise.

## An Evidence Culture

As with many other areas of public policy, health discourses have become powerfully influenced by expectations around evidence-based decision-making (Risjord, 2016; Thorne, 2009). This trend reflects an increasingly pressing public demand for accountability around the allocation of precious resources and also a progressive distrust that public officials and systems will always make decisions in the people's best interests (Lorenc et al., 2014; Nairn, 2012). Emphasizing that which can be established on the basis of evidence grew out of an acknowledgment within the professional health community that even experienced and apparently expert clinicians could be misled by pattern recognition and perpetuate practices that were unsound, ineffective, or, at times, even dangerous (Sackett et al., 1996, 1997). What an individual practitioner with the very best of intentions might subjectively understand as true based on practice judgment developed over an extensive period of time can, at times, be completely wrong (Sackett & Rosenberg, 1995). Radical and mutilating surgeries for non-invasive breast cancer long past the time the evidence clearly favored breast-conserving procedures might be the kind of instance in which we would all agree on the value of agreement on propositional evidentiary truths that justify stopping outdated practices.

Understanding that background, it is not difficult to appreciate the rationale underlying the evidence-based practice movement's goal of finding mechanisms for accessing shared truths about which we can have the highest degrees of confidence (Thorne & Sawatzky, 2014). The taxonomy we refer to as the "hierarchy of evidence" therefore represents an estimation of the distance between the findings of any study and the possibility of human error or methodological artifact. Organizing what is known according to those aspects about which the objective knowledge is quite clear and those about which we can suspect trends or patterns becomes an important device for focusing the knowledge uptake conversation (Bluhm, 2016; Risjord, 2016). That means that studies based on methodologies such as double-blind randomized controlled trials (RCTs) not only count as evidence, but, within the evidentiary analysis, they play a particularly important role.

Where knowledge development is actually amenable to that form of inquiry, RCTs can create a strong basis for the development of an increasingly widespread agreement on certain parameters of a problem. However, it would also be a serious error to assume the knowledge yielded by such studies will inherently have relevance across all contexts or conditions (Johnson, 1997; Risjord, 2016). Within health care circles and at public policy tables, there is an increasingly sophisticated understanding that clinical trials and other forms of strong evidence are based on particular measures, instruments, and problems. They

will have answered some questions about the matter at hand and yet will be completely silent on others. For example, researchers might produce incontrovertible evidence that robotic physicians and nurses can provide superior accuracy in diagnostic assessment to that of their human counterparts, but that evidence does not necessarily lead to the conclusion that it is the right thing to do. Matters of ethics, safety, economics, equity, values, and even human subjective experience become part of the larger context within which important decisions are taken. Thus, the culture of evidence-based practice is stimulating a wide range of conversations across society about how we know what we know and the bases upon which we can confidently make decisions that take advantage of that knowledge.

### *Entering the Evidence Debate*

Proponents of qualitative research methodologies have long recognized the historic lack of enthusiasm from within the quantitative research community (and therefore, by default, from the policy and practice communities) for finding a mechanism by which to afford due credit to the products of their inquiries (Grypdonck, 2006; Leeman & Sandelowski, 2012; Williams et al., 2019). Not unexpectedly, within this hierarchy, the products of qualitative research count as extremely weak contributors, if indeed they are noticed at all (Evans, 2003; Rolfe, 2016). In calling attention to the problem of what to do with qualitative research in an evidence-based culture, some qualitative advocates have gone so far as to discredit the hierarchy of evidence as an appropriate “gold standard” by which various scientific evidence claims ought to be judged (Clarke, 1999; Freshwater et al., 2010; Freshwater & Rolfe, 2004; Paley, 2016).

Other scholars committed to advancing the kinds of insights that qualitative research can yield about practice fields have focused on trying to educate the broader scientific community toward an appreciation for the special contribution of products that derive from the use of qualitative approaches. They have implored that community to grant qualitative work a rightful place as an important form of evidence and challenged policy decision-makers to make full use of the body of qualitative and quantitative research when making evidence-based decisions (Greenhalgh et al., 2016; Kearney, 2001; Korhonen et al., 2013). However, both of these efforts have been compromised by a widespread climate of conceptual confusion associated with evidence and evidence claims (Paley, 2016; Rolfe et al., 2008; Scott-Finlay & Pollock, 2004).

The unfortunate paradox associated with this effort to obtain real clarity is that we see opposing tensions, even within the qualitative world, between those who value an exclusionary definition of the idea of evidence and those who will go to great lengths not to be left out. Thus it becomes very difficult, both conceptually and linguistically, for qualitative researchers to confidently place the

fruits of their labor into an evidence conversation without risking critique from one side of the spectrum or the other.

### ***Evidence-based Practice or Practice-based Evidence***

Because “evidence-based” has, in current parlance, become essentially synonymous with “best quality,” an evidence-based claim about one’s activities or services conveys the connotation of credibility, integrity, and excellence (Rolfe, 2016; Thorne, 2016). Recognizing the increasingly prominent social worth of all that is associated with “evidence” in the practice world, scholars across the applied fields have struggled to integrate evidence language into their discussions of what constitutes credible knowledge for informing practice (Duff et al., 2020). This has created something of a linguistic landmine, and in differentiating evidence-based practice from that which is evidence-informed, terms such as *best practices* or *better practices* have entered the lexicon to imply various degrees of credibility within a context in which it would be inappropriate and irresponsible to assume evidence alone was sufficient.

The originators of the idea of evidence-based practice clearly assumed a valuable role for individual clinical expertise in determining whether external evidence applied to an individual clinical situation at all and, if so, how it ought to be applied (Sackett et al., 1996). However, various later treatments of the concept have sought to either erase the role of practice wisdom in the enactment of proven practices or to take the opposite extreme and reformulate that practice wisdom as if it too is a species of evidence (Tonelli & Shapiro, 2020). The former tends to create a practice ideology within which the gaze of the practitioner is increasingly directed toward populations and systems of care, rather than on the uniqueness and distinctiveness of individual cases (Mantzoukas, 2007). The latter has taken the form (in the case of my discipline at least) of attempts to describe a range of knowledge types as various forms of evidence. Examples include qualitative evidence, clinical evidence, conceptual models, aesthetic knowing, and even patient preference—all somewhat illogically pitched “as evidence” simply because they might play a legitimate role in determining right action in some instances (McCrae, 2012; Melnyk & Fineout-Overholt, 2011). This circularity of logic certainly defeats the point of evidence; however, when we observe the efforts that have been taken to try to gain credibility within it, we are further reminded of the compelling power that the evidence ideology holds.

In response to these conundrums associated with the rapid and universal endorsement of the evidence-based practice movement, some scholars have started to think about a form of “practice-based evidence” that might accompany the demand for evidence-based practice. The idea, originally attributed to Green (2008), is that if evidence-based practice is to become a reality, we need to learn how to develop a form of evidence based on the realities of the practice world

(Brownson & Jones, 2009). This may constitute such directions as developing research on the basis of practice partnerships and studying innovations that arise from the context and experiences of practitioners working in real-world practice settings, combined with a science that will explain how innovations and transitions in practice are implemented and integrated into the habitual patterns of doing business (Doane & Varcoe, 2008; Leeman & Sandelowski, 2012).

### **Injecting Interpretive Description into the Evidence Agenda**

One can certainly appreciate the frustration of qualitative scholars that their hard-earned products seem to have been bypassed in the discussion of what constitutes evidence, for we do sometimes seem to be speaking entirely different languages on the opposite sides of the methodological divide. However, either competing for a fixed position within the evidentiary hierarchy or discounting that hierarchy in favor of uncritical advocacy for the uptake of qualitative research products would be a misguided and ultimately counterproductive path forward. Clearly, we require coherent strategies for developing and advancing the kind of knowledge that can find its way into applied realities. However, instead of wasting our efforts trying to jockey for position with very different kinds of scholarly processes, I believe that there is much we can do in the conceptualization, design, and direction of our qualitative inquiry products to begin to make them as relevant and meaningful as possible to that wider evidence conversation. And because I view the kind of grounded, practical, and relevant qualitative studies that interpretive description invites as a form of knowledge product that can profoundly shape the sensibilities of the practice context, I believe it has an important role to play in expanding consciousness among the key communities within which the decision-making structures of our society evolve.

### ***Strategic Positioning***

Rather than expending valuable energy demanding that qualitative science be “counted,” there is likely much greater benefit from learning how to direct our research activities toward addressing the specific evidentiary challenges within each of our applied and practice disciplines. By this I mean explicitly identifying those elements of our practices about which human experiential knowledge amenable to qualitative inquiry is lacking, tackling head-on the aspects about which our disciplines have a comfortable certainty despite gaps within the experiential dimensions, and grounding our research questions squarely within the issues that have the greatest potential for producing timely and relevant knowledge (Broeder & Donze, 2010; Doane & Varcoe, 2008; Marrocco & El-Masri, 2021; Rolfe, 2016). For too long, qualitative researchers have tended to consider all matters of human experience of equivalent relevance in the research

enterprise, and topics have not infrequently been chosen on the basis of whim, personal curiosity, or convenience. Within the applied disciplines, I would hope that the era of justifying a qualitative study without a strong relevance argument is nearing its end. Accordingly, we can look to the kinds of strategic studies that become possible when a researcher is well informed not only by a sound understanding of the evidential complexities of the applied field in question but also by a thoughtful and critical appreciation for the kinds of distinctive contributions to knowledge that a well-conceptualized and targeted qualitative investigation can make.

### *Filling Gaps*

Among the strategic purposes to which interpretive description can be put is gap-filling within the recognizable uncertainties and absences in available knowledge. In applied fields, decision-makers and policy planners are always faced with diverse bodies of knowledge, each associated with differing levels of certainty and confidence. They may know, for example, that 80 percent of persons receiving a particular intervention, resource, or piece of guidance reliably report doing well with it. However, rather than uncritically concluding that it is worthy of sustained investment, they may find it useful to better understand who the 20 percent who don't report so favorably are, what their experience looks like, and why it differs from the majority. Thus, the art of gap-filling depends on really "knowing" the interests and aims of those who hold influence in your applied field and orchestrating your studies so that they take direct aim at the kind of knowledge that might prove particularly useful to ensure that policy and planning errors can be avoided or effectively managed.

A particular aspect of gap-filling that can be of interest to the quantitative research community is using qualitative approaches to inform and improve qualitative measures (Hollin et al., 2020; Vass et al., 2017). In health care, recent decades have witnessed an upsurge in pressure for researchers to measure outcomes that matter to patients. And although dozens of such measurement instruments have been developed by researchers, there is little evidence that these are doing anything to actually improve outcomes (Nelson et al., 2015). While many of our quantitatively oriented colleagues have been encouraged to try to build qualitative elements into their designs in order to get closer to what matters to patients, they often need help thinking beyond mere documentation of qualitative data or attempting to work out what relevance the abstractions from a more theoretically oriented qualitative investigation could provide. Using an interpretive description approach, it becomes feasible to explicitly direct inquiry toward such questions as what the instrument is missing and how else we might know that. Further, it could help uncover valuable understandings of the conditions under which data deriving from that instrument are most likely to miss or misrepresent

aspects of the phenomenon under consideration and the implications of having missed them. We'll say more about this in Chapter 15 when we reflect on mixed methods applications.

Beyond informing instrumentation, the realities of pressing challenges in the applied setting offer numerous opportunities for thoughtful use of qualitative approaches to gluing available knowledge together. Health care systems, for example, are highly concerned about matters of efficiency, timeliness, and cost-effectiveness (Folland et al., 2024). Sometimes the most important and usable insights about such issues as barriers to accurate diagnosis and management of health conditions, cases that defy care pathways, or contexts in which expensive workarounds are predictable will be most accessible through strategic qualitative investigation of key players. Thus, thoughtful awareness of the kinds of knowledge that those with decisional influence might be seeking, even if they don't know it yet, can help you tailor your proposed (or even in-process) interpretive description studies toward addressing a knowledge gap that actually matters and for which there is a ready audience.

### *Challenging Assumptions*

Another important strategic role for the use of applied qualitative studies is disrupting and deconstructing that which is commonly assumed or “known to be true” within a field. Although we may all theoretically realize that science marches on, and the world of ideas as we know them will change over time, we often function in the applied fields on the basis of “established truths” that are held unquestioningly until they are effectively challenged. These “taken-for-granted” can be empirically grounded, entrenched in that which has been amenable to study and documented from that perspective. It is not uncommon for practitioners to wonder whether the most recent and solid evidence in the field is somehow lacking. Relevant contextual factors may have been systematically eliminated from study designs, selected measures may have missed key experiential components, or the analyses may have conflated concepts that seem intuitively distinct to the wise practitioner. Alternatively, the “operative truths” may be more ideological in nature—those assumptions that so often find their way into policy and practice because they seem morally correct or socially desirable. Informed consent is an example of this kind of assumption. Because we tend to uncritically assume that informed consent procedures are grounded in established ethical reasoning, we may fail to notice the harm they do patients under certain circumstances, such as the requirement to provide information for which the patient may not be emotionally ready (Olliffe et al., 2007).

Doing research that challenges assumptions requires familiarizing ourselves with those aspects about which inherent uncertainties may be productively

addressed through rigorous, systematic, and thoughtful interpretive inquiry tapping the subjective or experiential perspective of those most affected. Upshur (2001) offered an excellent example of this when he described using two research papers in teaching evidence-based medicine: one was a meta-analysis of studies showing the lack of benefit of antibiotics for acute respiratory illness, and the other a qualitative study of the perceptions of physicians who prescribe them for viral sore throats despite that evidence. In this instance, the qualitative study illuminated the experiential and relational aspects of primary care that explain why the practice persists. By directing attention to the context of the clinical encounter in which the evidence becomes relevant, the qualitative study yielded knowledge that was easily recognized by all concerned as having importance to the broader question of finding strategies to provide better care. And while occasionally we are able to find good examples of pieces within the literature that fit together in this manner, all too often there are aspects of study design that make retrofitting at the intersection of useable insights too speculative to be useful. The key, then, is ensuring that our studies are designed from the outset with an awareness of that broad context, an informed curiosity about what prevents our applied fields from doing their best, and a genuine enthusiasm for solving puzzles.

### *Illuminating Subjectivities*

Although it may not always be the most strategic kind of qualitative inquiry, and arguably the qualitative genre has paid more attention to this kind of research than to other more pressing urgencies, I believe there is still a role for qualitative studies that seek to catalyze empathy and understanding for the human experiences that reflect the foci of our applied fields. However, I also believe that the rationale for this kind of study in an applied field ought not to be simply that one would like to better understand what it feels like to experience a particular phenomenon, but that there is some defensible reason that deeper knowledge about that phenomenon could add value. It may be that a particular patient or social group suspects that it receives less sensitive or compassionate care than do others, or that the available qualitatively derived knowledge in a field has been overly narrow to determine the extent to which it may apply. It may be that there are systemic injustices toward which an illumination might bring needed attention, or perhaps the phenomenon represents a particularly subtle or nuanced kind of experience that could go undetected unless practitioner antennae are especially attuned to it. Within each of these kinds of situations, we see not only an experience that could be documented but also a reason for doing so. And within that reason, we will take methodological direction to ensure that the ultimate story we tell will not only reflect the subjectivities of interest but also the applications into which they can be inserted.

Thinking about our studies of human subjective and experiential phenomena in this manner, we depart from the neutral observers and theorizing methodologists in asking our research questions with an ultimate audience in mind. This significantly strengthens our capacity to ask meaningful questions, design data collection and analysis approaches that allow us to follow the leads that arise in the conduct of the study, and allows for the kinds of conclusions and recommendations on the basis of our research that go well beyond calling for “understanding” and orient us more directly as to the impact and outcomes that understanding is intended to produce. An example of the kind of work I have in mind is that of Taverner and colleagues (2014) on the experience of pain in chronic leg ulcers. Rather than settling for a graphically vivid and evocative depiction of the gruesome nature of that pain, these researchers turned their exploration into a grounded documentation of the attitudinal and assumptive barriers that were blinding care professionals to the depth of the pain being experienced by privileging their focus upon the task function of wound management.

If there really is no basis upon which to understand what a situation or experience probably feels like, a good qualitative study may provide value to practitioners in the applied field that engages with it. However, we may well be past the era in which it is justifiable to devote precious research time and resources simply to showcasing the difficult and dreadful human experiences that have attracted a considerable proportion of the attention by qualitative scholars in a field such as health. Because there are so many pressing needs, such as to improve care, enact service, or envision a better set of circumstances, applied qualitative studies that are concurrently directed toward some eventual practical purpose may well be the kinds of studies that are most likely to be taken up and read.

### *Interpreting Variance*

A final and important role for applied qualitative research, and one we have alluded to frequently in earlier chapters, is the documentation and interpretation of variance within the phenomena of interest in our fields. In contrast to the “lived experience” idea, which tends to essentialize the human experience it documents within its common properties or attributes, much of the art of applied expert practice has to do with being able to notice, understand, and respond to variation. It takes relatively little clinical imagination to fit a patient into an existing standardized plan of care; it takes much more wisdom and knowledge to identify aspects of an available care pathway that may not fit individualized conditions and to effectively interpret what to do about it. The confidence that helps build that kind of skill and accuracy in variance management can come from informative depictions in which that which is common

is carefully balanced against that which is different among and between cases. Thus, the kind of research that will most directly build clinical depth and insight is that which pushes practitioners beyond the boundaries of what they may assume and have seen and into the domain of increasing variance and why it matters.

A particular instance of where variance interpretation matters is that of rare and special populations. While applied practitioners may not have seen a particular phenomenon previously, their capacity to notice it when they do see it and to understand its potential relevance can be informed by their having been exposed to how other variations play out. For example, a social worker comfortable adjusting informational support among a wide range of cultural groups is more likely than colleagues without that experience to respond effectively when encountering a client with an entirely unfamiliar cultural background. The kind of qualitative research that helps not only unpack a particular condition but also the intersection of social and contextual conditions under which it might be quite differently experienced will add meaningful and useable knowledge to the practice field (von der Lipp et al., 2017). Recognizing that documenting all possible variation in any study of human persons is an impossibility, what is needed are studies designed to augment the capacity to notice and appreciate the idea of variation and acquire wisdom in interpreting and engaging with it.

Directing our applied qualitative studies toward interpreting variation can be especially relevant to issues about which we have concerns about equity. Since so much of what is available in terms of health and public services is oriented to the dominant majority's needs, we recognize not only that predictable inequities exist but also that they differentially harm those already disadvantaged. It is well recognized that qualitative studies can play a particularly powerful role in bringing those kinds of inequities to light, disentangling them from our common and disciplinary understandings, and showcasing where action is needed. In the practice world, we do need to know not only what works but also who it doesn't work for, and when and why. By alerting the practice world to the kinds of inequities that may be associated with diversities on a theme, the applied qualitative research world can serve an important advocacy function.

Thus, the potential contributions of qualitative research to the understanding and uptake of evidence in the applied field are significantly augmented if we take our direction from our disciplinary orientations and our applied practice mandates, rather than from methodological or theoretical logic. Being strategic about not only the methods we deploy but also the nature of the applied worlds toward which we direct them, we can increase our capacity to ensure that our qualitative efforts reach their mark and make a difference. Thoughtful applied qualitative studies can serve as the "glue" that begins to bind all of the various aspects of what we know into a more coherent and useable whole.

## A Continuing Role for Small Studies

In our discussion of sample size in Chapter 5, we acknowledged that a significant proportion of published qualitative studies in the health fields have been conducted on the basis of relatively small samples. And while a robust original contribution to knowledge on a particular topic may be ideally served by a study capable of demonstrating multiple conditions and variations on a theme, there still seems to be an important role for the smaller study. Since all qualitative researchers need to begin somewhere, and a study of manageable proportion is an appropriate beginning point for the newer researcher or the researcher new to qualitative methods, there is an understandable interest in using such projects to optimal advantage.

Notwithstanding the strategic direction advocated earlier in this chapter as an ideal positioning for interpretive description, the method will continue to be relevant to the small study initiative as well. In the applied health world, it creates a viable entry point for practicing clinicians and teams of clinicians, or for professionals getting their feet wet in the world of research through graduate theses and projects. Because applied practice professionals enter research with a disciplinary orientation and motivation in mind, they may well be ideally positioned to identify practice disconnects, knowledge gaps, or care barriers within their own sphere of expertise that might yield usable insights. Directing an applied qualitative study toward local conditions may or may not yield results that have applicability to other contexts, but the insights that can be uncovered can often reflect the attributes of a well-developed case study that may well be of wider interest. Discovering, for example, what influential attitudes, personality dynamics, and physical structural oddities are making it difficult for family members to feel comfortable approaching care staff in your intensive care unit may not tell your colleagues in another city much about their own particular context, but it may allow them to think about theirs differently. Thus, as long as the researcher or research team behind a small study has a thoughtful appreciation for the scope and limits of the knowledge that can be uncovered, the findings of a small study can have both local and wider appeal. A review of qualitative papers in clinical journals across the health field confirms that many such studies have been read and well cited by practitioners who clearly found something of value in them.

I see interpretive description as the ideal methodology for the small applied qualitative study. Although there may be some appeal to taking up a more simplistic stepwise guide (such as thematic analysis or content analysis, as depicted in much of the current published literature) in such a study, rather than taking on an approach in which you will need to think through the logic of your own design, in my experience that process is not at all beyond the capacity of thoughtful applied practitioners or newer researchers. Although neophyte researchers often do appreciate the security of having a mentor involved, teams and colleagues

can also provide useful support and divide up the work of a straightforward small qualitative study. Further, I find that having to work through design option decisions creates a sense of ownership, clarity, and confidence around the limits and implications that may advantage the quality of the final product. While quantitative evidence provides the empiric knowing necessary for practice, it has been argued that qualitatively derived insights support the personal and experiential side of knowing (Broeder & Donze, 2010). Practitioners who engage with applied qualitative approaches as part of their discovery learning build a base upon which they align their practice understandings with evidence forms that are more systematically generated and externally audited to support their own professional growth and that of others. And as they refine their capacity to point their investigations toward questions that are accessible to qualitative inquiry and strategically relevant to their field, they will build a foundation upon which to make increasingly scholarly and comprehensive contributions over time.

### **Building a Longitudinal Program of Research**

While the literature in the applied and practice fields is full of what we might call “one off” studies, it is easy to appreciate why settling for the limits of what one study can accomplish can leave much to be desired. Over time, and as an individual scholar matures, it seems increasingly important to capitalize on our completed single studies by advancing them forward into programmatic research. In that they are planned, purposeful, and substantively linked, such enterprises are understood to advance the field toward enhanced practice or policy development.

In an earlier era of disciplinary thinking and substantive field development, it might have been the norm within the academic world at least to locate oneself within a particular academic or professional community and attend to definitional boundaries around one’s work. Increasingly, in an era of interdisciplinary collaborations and cross-fertilization of fields, scholars have recognized the inherent value of stepping out of their comfortable surroundings and joining conversations in other sectors of knowledge generation and implementation. This allows for a very different kind of programmatic research than was typical even a generation ago. And because it is no longer the wider community that is defining the boundaries, this environment calls upon scholars to reflect mindfully on the program of thought leadership that will be their own distinctive contribution, regardless of the diversity of conversations in which they find themselves.

In evolving a program of applied research, scholars in today’s context tend not to limit themselves to target populations and study settings but rather ground their research programs in the context of particular vexing problems or lines of intrigue. For example, instead of framing a program of research as being about documenting the information needs of cardiac patients, a scholar’s path

might evolve around uncovering the manner in which intersections between social determinants of health shape the impact of various information exchange modalities for patients or the implications of the evolving social media and informational controversies in which cardiac patients engage. What helps make this kind of ongoing exploration programmatic is regular periods of critical reflection toward articulating what aligns the parts and makes the body of inquiry coherent, such that the researcher is not flitting from one interest to the next but allowing intellectual curiosity based on an informed grounding within a phenomenon of relevance to guide the subsequent direction of investigation toward robust knowledge development.

# 15

## INTERPRETIVE DESCRIPTION IN MIXED METHODS RESEARCH

An increasingly important opportunity for bringing the qualitative lens into the wider evidence conversation is to capitalize on its utility in the context of mixed methods research. In health care, for too long we uncritically accepted the assumption that a single well-designed study can produce sufficiently strong “evidence” to provide certain answers. The evidence hierarchy that we all learned early in our scientific training reinforces this impression that only certain kinds of studies can attain a pinnacle of “truth.” In the legal system, we understand the concept of the “weight” of evidence, or the “preponderance” of evidence, a reference to the idea that there is always and necessarily a vast body of material that together makes up what is understood as evidence (Thorne & Sawatzky, 2014). We fully recognize that even the “smoking gun” is rarely sufficient to convict, especially if collateral evidence suggests a different perpetrator. In fact, the legal concept of evidence further presupposes that an unequivocal understanding of it will be infrequent (Upshur, 2001). Rather than arguing the relative weight that ought to be inherently placed on any one kind of research, then, many scholars want to contribute to a community of applied research that becomes increasingly sophisticated in appreciating the limits inherent in all evidentiary sources as well as the tremendous value that a rich, diverse, and robust body of evidence can provide in our quest for useable knowledge.

### **The Mixed Methods Research Tradition**

Over recent decades, the prevailing discourses around evidence and the complexity of phenomena of interest to the applied and practice fields have created considerable enthusiasm for exploring mixed methods research designs

combining various forms of measurement with qualitative aspects (Palinkas, Mendon, & Hamilton, 2019). The appeal of such methods is their capacity to allow for examination of issues from multiple perspectives within the same study or program of research. The basic premise is that few of the significant problems within our substantive areas are solvable using singular approaches, and the contrasting attributes of qualitative and quantitative inquiry approaches can serve as a check and balance for the limitations of either as a body of knowledge grows (Poth & Shannon-Baker, 2022). However, because qualitative and quantitative research methods have derived from, and remain associated with, such different ways of understanding the world of knowledge (Slaney & Tafreshi, 2019), it is not surprising that the two kinds of methodologies are not always an easy fit, and considerable effort has been paid to trying to work out why this matters and what to do about it.

For much of the history of applied science as we know it, the issues of “paradigmatic difference” (in the sense discussed in Chapter 2) have seemed something of a stumbling block. While some scholars in the social sciences have been conducting studies using approaches that might be termed “mixed research” or “triangulation” (Denzin, 1978; Morse, 1991) of multiple angles of study on a phenomenon of interest for over a century, the idea that we currently know as “mixed methods research” has only been formalized as such over the most recent decade or two (Fàbregues et al., 2021). What became the classic original textbooks on mixed methods research were first published in 1998 and 2003 (Tashakkori & Teddlie, 1998, 2003), and *Mixed Methods Research*, the first journal dedicated to this approach, was launched in 2007. In their editorial entitled “The New Era for Mixed Methods” for the first issue of that journal, Tashakkori and Creswell wrote,

Mixed methods is still developing and will do so for years to come. There are important unresolved issues, and unexplored aspects that need to be explored, in addition to the core issue of defining the nature of mixed methods research.  
(2007, p. 4)

They recognized that, as the language of mixed methods evolved, it would be important to build some consensus on terminology (including the many terms that were already in popular use), and they acknowledged that reflection would be needed as to who controls the discourse around mixed methods research. In another early paper in that journal, Johnson, Onwuegbuzie, and Turner (2007) positioned the approach that was beginning to coalesce under the rubric of “mixed methods research” as being in a space “between the extremes [of] Plato (quantitative research) and the Sophists (qualitative research), with mixed research attempting to respect fully the wisdom of both of these viewpoints while also seeking a workable middle solution for many (research) problems of interest” (p. 113).

Thus, while the idea underlying mixed methods inquiry was not new, it had “acquired a formal methodology that did not exist before,” and came to take its rightful place within the two major methodological communities as “the de facto third alternative,” or “third methodological movement” (Tashakkori & Teddlie, 2010, p. 804). Since those early years, an extensive body of writing has evolved, including considerable philosophical debate on the contested issues that arise when one seeks to work in a zone somewhere between two supposedly mutually exclusive worldviews (Creswell, 2011) and the working out of what are rapidly becoming understood as established mixed methods methodological principles and practices (Creswell & Plano Clark, 2018; Plano Clark & Ivankova, 2016; Tashakkori, Johnson, & Teddlie, 2021).

### **Alignment with the QUAL and QUAN Traditions**

Because members of the applied research community had historically conceived of qualitative and quantitative research as paradigmatically divergent and mutually exclusive worldviews, many of the initial forays into mixed methods involved practitioners of one tradition beginning to put out feelers into the other to explore options to add new dimensions onto their existing programs of inquiry. For example, quantitative researchers might explore the possibility of an open interview component to their study, and qualitative researchers might insert a measure into their generally ethnographic approach. These experiments soon confronted scholars with challenges around how to sequence these various steps in their studies, what the implications of one kind of inquiry might be on the other, and how to effectively and logically interpret or integrate what was found. As the mixed methods project developed, scholars clearly saw a distinction between studies that utilize two types of data without serious integration and those that genuinely seek to fulfill the distinctive objective of a paradigmatically distinct mixed methods ideal. And many scholars have experimented with how to branch into mixed methods work from a base that had once been firmly grounded in one or the other methodological heritage.

#### ***Quantitative Dominant***

At one end of a theoretical continuum of mixed methods approaches is the kind of study that is labeled “quantitative dominant” (or symbolized as QUAN + qual if simultaneous, or QUAN → qual if sequential) (Palinkas et al., 2011). For the most part, this kind of research would be conducted by those whose primary program of research aligns well within the conventional (post-positivist, objectivist) research tradition but who want to include qualitative data and possibly approaches into their otherwise quantitative projects (Johnson, Onwuegbuzie, & Turner, 2007). In this context, qualitative aspects can be built into larger studies,

including randomized controlled trials (Snowdon, 2015), sometimes in a manner that Miles and Huberman (2019) classically referred to as “quantitized” qualitative data. In intervention research, for example, a researcher might use quantitative methods to measure intervention outcomes and qualitative methods to understand processes and propose ideas about possible mechanisms at play (Palinkas et al., 2011). Because understanding process requires detailed descriptions of human engagement, and perceptions of that engagement differ between people, qualitative inquiry allows researchers to capture a sense of the fluidity and dynamism of processes that cannot be fairly summarized on a single rating scale (Patton, 2002). Moving beyond observational research within naturalistic case studies to understand implementation, prospective experimental designs have been used to develop, test, and evaluate specific strategies designed to increase the likelihood of implementation (Palinkas et al., 2011).

Program evaluation is another context in which QUAN-qual mixed methods have proven highly effective in expanding conventional post-positivist approaches into the capacity for a more holistic evaluation of the phenomenon of interest. Combining qualitative and quantitative inputs, mixed methods evaluation fulfills the requirement of multiple inputs and counters the inherent weaknesses in “rigorous” evaluation designs such as quasi-experimental designs and randomized control trials. For example, as Lane-Fall (2023) argues, epidemiology would be incomplete without qualitative and mixed methods research. Thus, across a wide range of disciplines, program evaluation researchers are increasingly calling for “unshackling” the field from the former constraints of single-mode inquiry (Reeping et al., 2019).

### *Qualitative Dominant*

At the opposite end of that theoretical continuum of mixed methods approaches is the type of mixed research that is labeled “qualitative dominant” (and symbolized as QUAL + quan if simultaneous, or QUAL → quan if sequential) (Palinkas et al., 2011). This type of research would be primarily grounded in a qualitative, constructivist-poststructuralist-critical, or interpretivist view of the research process while also recognizing the added value that the addition of quantitative data and approaches might bring (Johnson, Onwuegbuzie, & Turner, 2007). Such studies might be depicted as methodologically qualitative studies that integrated “qualitized” quantitative data (Tashakkori & Teddlie, 1998).

The idea of combining “stories and numbers” is well established in many of the applied disciplines in which a strong qualitative research tradition has flourished. Qualitative inquiry is often explicitly designed to complement that which can be known through alternative means, whether that knowledge base is developed by others in the field or within a particular line of ongoing inquiry. In particular, according to Berman and colleagues, critical scholars in the applied and

practice fields such as nursing, are “not content with the goals of either the positivist or the constructivist paradigms. They do not wish to control and predict, or to understand and describe, the world. They wish to change it” (1998, p. 3). Thus, programs of research tend not to be determined by adherence to particular methodological affiliations as much as they are with strategic decisions around how best to solve problems.

As Poth and Ongwuegbuzie noted in their 2016 editorial introduction to a special issue on mixed methods in a leading qualitative methodology journal, there is strong evidence of enthusiasm within the qualitative research community for exploring the new opportunities mixed methods research might engender (Poth & Ongwuegbuzie, 2016). Reviewing the available body of published studies with a significant qualitative emphasis at that time, they noted that, for the most part, such studies reflected what Creswell and Plano Clark (2018) consider to be convergent parallel design, and the other half used either exploratory or explanatory sequential designs. An example of this would be to use qualitative approaches to develop new models of phenomena of interest and then build quantitative measures to test them. For example, Cairney and colleagues (2017) describe an Australian mixed methods study in which an Aboriginal wellbeing framework developed collaboratively through the use of stories of cultural values led to a quantitative survey from which structural equation modeling demonstrated high degrees of correlation among the cultural values and confirmed the holistic nature of the framework. This particular model of developing models from people’s stories and then testing them with relevant populations has been popular with many research funding bodies, in that it provides an understandable justification for what might be the added cost and complexity of a mixed methods approach to a program of research (Palinka et al., 2011).

### **The Idea of a Paradigmatically Distinct Mixed Methods Approach**

According to Tashakkori and Creswell (2007), unlike studies that are primarily situated in either a qualitative or quantitative paradigm, a study qualifies as fully (rather than partially) mixed methods in its orientation if (a) the research questions stem from both the qualitative and quantitative paradigms, (b) the questions contain both pre-planned and participatory elements, (c) both probability and purposive sampling are used, (d) both qualitative and quantitative data are collected and visible within the written report, and (e) both types of analysis are used, such that inferences and conclusions are clearly derived from both aspects. It is not simply that both qualitative and quantitative components exist, but that the interface between them is such that the study results demonstrate the impact of serious integration (Strudsholm et al., 2016). Palinkas et al. (2019) further explain that the integration of the two approaches ideally occurs at all phases of

the study (including design, data collection, and interpretation), often within a program of research in which the studies are linked by the challenge of answering a single question or set of related questions. Thus, the best of genuinely mixed methods studies will be typically conducted by teams, with each member contributing specific expertise to the process of qualitative and quantitative integration, allowing for results that provide a better understanding of and answer to the research question than could have been attained through either method alone.

A wide range of varieties of these fully integrated kinds of mixed methods research projects is apparent across the literature of many different disciplines. Leech and Onwuegbuzie (2009) and Creswell and Plano Clark (2018) have organized some of these designs into typologies, including convergence, transformation, complementarity, expansion or explanation, and multiphase designs. While some may reflect a weighting toward qualitative or quantitative techniques, they tend to be more balanced in this regard than do the QUAL+quan or QUAN+qual versions described earlier. Often, what also distinguishes them is what has been referred to as a “crossover strategy” for analysis, in which techniques deriving from one tradition (qualitative or quantitative) are used to analyze the data associated with the other (Hitchcock & Onwuegbuzie, 2020). This approach can be used as a primary analytic strategy within a mixed methods study or as part of its component parts. It can be dynamic or entail distinct component steps, and the degree of crossover analysis is determined by the nature of the research question.

### **BOX 15.1 UNRAVELING PROCESS COMPLEXITY**

As patient-reported outcomes are increasingly mandated in kidney care, this Canadian research team was interested in whether educational support for routine use of electronic patient-reported outcomes measures by clinicians could actually improve person-centered kidney care. They designed a process evaluation to evaluate a system and training intervention in an urban dialysis clinic in comparison to a comparable non-intervention clinic. Using a mixed methods longitudinal comparative concurrent design, they measured patient responses before and after the intervention, comparing changes in scores between sites using structural equation modeling. They then use interpretive description to evaluate the processes of intervention implementation. Although they found no improvement in scores at the intervention site post-intervention, the qualitative analysis provided insights into why such an intervention was only part of what was required to enhance person-centered care.

Schick-Makaroff, K., Klarenbach, S., Kwon, J.-Y., Cohen, S. R., Czupryn, J., Lee, L., Pauly, R., MacRae, J. M., Forde, B., & Sawatzky, R. (2023). Electronic patient-reported outcomes in clinical kidney practice (ePRO Kidney): A process evaluation of educational support for clinicians. *Therapeutic Advances in Chronic Disease*, 14, 20406223231173624. <https://doi.org/10.1177/20406223231173624>

The typologies approach has proven useful in building a shared nomenclature to describe basic variations on the mixed methods themes. However, according to Guest (2013), it has also created some unnecessary confusion by guiding authors to try to characterize their entire study, including a multifaceted study, within a single, and often inadequate, linguistic convention. As an alternative, Guest suggests a shift toward describing what actually happens at the point of interface where two or more data sets are mixed or integrated in some manner, which might more effectively capture the complexity and fluidity that is the reality of many mixed methods studies.

Although considerable methodological development has occurred over recent decades, most of those contributing to this project acknowledge that there are many remaining pragmatic and philosophical debates to be worked through. Philosophically, in contrast to the constructivism of the qualitative methods and the post-positivism or realism of qualitative work, Johnson and Onwuegbuzie (2004) claim a pluralistic pragmatism to be “the philosophical partner” of mixed methods approaches. It aims to find middle ground between the philosophical dogmatism and offers considerable freedom for researchers to find the best means by which to answer their particular research question (Doyle, Brady, & Byrne, 2016; Morgan, 2007, 2014). This pragmatism becomes an imperative because integrated mixed methods studies tend to be complex and non-linear (Palinkas, Mendon, & Hamilton, 2019), in that teams need to continually assess the extent to which the mixed methods intentions are being realized, whether sources of data are actually reconcilable, and whether time-efficient processes pertaining to the multiple components can be coordinated. There may be trade-offs to consider when team members from different disciplines must adhere to expectations of different publication or reporting formats and whether journal manuscript formats can effectively accommodate reporting of the complexity of design of the full study or if, in the end, the elements must be reported in distinct parts (Guetterman, Fetters, & Creswel, 2015; Palinkas, Mendon, & Hamilton, 2019).

Given the predominance of a pragmatic approach, those seeking to advance mixed methods engage in ongoing debates with respect to such issues as whether mixed methods research is in fact paradigmatically distinct from its qualitative and quantitative heritages and what it means to position it as such (Ghiara, 2020). Although the philosophical positionings of the qualitative and quantitative positions are reasonably well recognized, the implications of trying to inductively and deductively integrate various critical realist meta-theoretical positionings with quantitative findings and within a coherent and enabling philosophical paradigm are far from straightforward (Proudfoot, 2023). Further, the matter of causation remains a difficult one within the mixed methods tradition. As Johnson, Russo, and Schoonenboom (2019) explain,

The metaphysics of causality is interested in what the nature of the relation is, or what causal relata are; epistemology and methodology are concerned

**BOX 15.2 UNDERSTANDING WHAT WORKS BEST**

Physicians and nurses in a practice setting are often called upon for clinical supervision of various allied health professionals who support patient care processes. This Australian team wanted to find out what made this supervision effective. Using a sequential mixed-methods approach, they used an interpretive description design to create an interview study capturing the perspectives of a wide range of different kinds of allied health professionals working in a metropolitan public hospital. They then conducted a quantitative survey to assess clinical supervision effectiveness. Triangulating the qualitative and quantitative data, they were able to describe the importance of prioritizing the supervisory relationship within the organizational culture and the value of ensuring flexibility in supervision models, processes, and approaches suited to each profession's role and learning style.

Snowdon, D. A., Sargent, M., Williams, C. M., Maloney, S., Caspers, K., & Taylor, N. F. (2019). Effective clinical supervision of allied health professionals: A mixed methods study. *BMC Health Services Research*, 20(1), 2. <https://doi.org/10.1186/s12913-019-4873-8>

with how we reason causally, what notions guide model building and model testing, what models should be constructed and empirically tested, depending on the research question at hand; the semantics of causal claims has to do with the meaning of cause/causality, which may be context sensitive; finally, questions about use of causal knowledge are essential to those domains where actions and interventions are important.

(p. 145)

Although these leaders working to develop this methodological approach acknowledge that there are not yet perfect solutions, they do see highly promising opportunities.

**Where Interpretive Description Makes a Contribution**

In that it is an applied qualitative approach, interpretive description is much less theoretically driven and more pragmatic than many of the more conventional social science qualitative methodologies available to mixed methods researchers. It is designed with the logical flow of inquiry driven by a disciplinary epistemological orientation in mind and therefore is much more philosophically amenable to integration within studies or programs of research using quantitative methodologies than are those methods more explicitly situated in a

paradigmatically constructivist ontology. Indeed, applied qualitative researchers tend to exist within worlds like health, social, and public planning in which quantitatively derived biological, mechanical, and population forms of evidence have conventionally been the policy drivers, and therefore its practitioners understand and comfortably situate themselves in a world comprised of these competing interests.

The form of an interpretive description research question (what can be learned from...?) is ideally framed to align with a wide diversity of inquiry modalities. Further, since translation of knowledge into practice is central to the selection of research questions and the development of study designs, it is malleable to a wide range of current conditions, contexts, and applied purposes. While many study designs (both qualitative and quantitative) include rigid technical conditions within which the quality of the enterprise will be evaluated, interpretive description is intended to allow flexibility according to the need and to be adjustable to the evolving conditions and emerging insights, without such decisions constituting a threat to its overall integrity. Its credibility measures are not theoretical in nature but more oriented to the authenticity, clarity, responsiveness, and integrity of the enterprise. Therefore, in a mixed methods design, interpretive description will often be a much more agreeable companion to its quantitative counterparts than might many other qualitative options.

Dolan et al. (2023) see interpretive description as an ideal fit for use within mixed methods research for several reasons. It is less tightly bound to extant theoretical positioning than would be most of the approaches that have arisen from the intellectual projects of the social sciences. Further, it is inherently pragmatic in its orientation. It allows for an efficiency that may be well suited to the demands of a complex, multi-faceted study within the applied and practice fields. As is the case with pragmatism, it sees knowledge as context bound and therefore readily allows for coexisting multiple realities, including those that might seem mutually exclusive in a more purist philosophical sense. The notion of integration of analysis from multiple data points is strongly reminiscent of how disciplinary applied and practice knowledge works. Expertise within a clinical practice, for example, builds over time on the basis of empirical, analytical, theoretical, experiential, and practical learnings, collectively resulting in a more coherent and robust understanding than could have been produced through any of those in isolation. And the logic of why multiple sources might be needed over time toward wisdom is entirely self-intuitive within the applied and practice disciplines.

Conducting a systematic review of published examples of mixed methods research using interpretive description, Dolan et al. concluded that, as with much of the mixed methods research, there was a need for further reporting development, such that the credibility criteria for interpretive description could be made transparent in the process and the representation of integration results rendered

explicit in the results display. However, they felt that interpretive description was consistent with a philosophically sound and rigorous contribution to mixed methods research.

The philosophical epistemological, ontological, and axiological orientations of interpretive naturalism and pragmatism do not stand in conflict with each other. Rigor in a MM-ID study can be achieved by paying particular attention to the purpose, process, and context of the research, as well as purposeful integration throughout the research process.

*(2023, p. 11)*

Thus, I see interpretive description as being particularly useful within the mixed methods context, unfettered as it is by the more theoretical baggage of some of the conventional social science approaches and more pragmatically suited to posing questions that are strategically targeted toward that which lurks in the shadows beyond what can be illuminated by measurement options.

# 16

## AGGREGATING, SYNTHESIZING, AND BUILDING KNOWLEDGE

In recognition of the inherent limits of any single qualitative study and the overwhelming need to develop increasingly complex and comprehensive bodies of knowledge, various authors have proposed directions forward in combining, aggregating, and synthesizing what is already known and what is yet to be discovered. In Chapter 17, we will conclude with a discussion of exciting developments in the field of integrating knowledge, such as that derived from our qualitative initiatives, into the everyday work of the applied and practice fields. To set the stage for the final chapters, we will here review a number of current and emerging approaches to building knowledge beyond the scope of our single interpretive description studies.

### **Secondary Analysis**

In that there is often a great deal within the database developed for a qualitative study that has not been fully tapped by the analysis guided by the original research question, and because the work of constructing a data set can be costly and time-consuming, various scholars in applied and practice fields have explored the possibilities inherent in secondary analysis (Heaton, 2019; Hughes et al., 2023; Sharp & Munly, 2022; Thorne, 1994, 2013b). In some instances, secondary analysis involves revisiting a data set on the basis of a new or revised research question on some aspect that deserves further elaboration, and in other cases it involves working with combined data sets from existing data sets to extend aspects of the original line of inquiry within an expanded context, which may or may not also involve new primary data collection.

While both overt and covert forms of secondary analysis exist in the literature (Heaton, 2004), failure to acknowledge the secondary nature of an analysis jeopardizes authenticity with respect to the relationship between the data set and the question it was designed to answer. Thus, increasingly, scholars are openly acknowledging their work as secondary where it extends beyond the original intent, builds findings upon the basis of a series of studies, or brings together multiple scholars in a field, each with their own data set, to generate more comprehensive and nuanced understandings.

In the applied and practice fields, researchers often find that the experience of immersing themselves in primary data opens up additional questions and lines of inquiry that deserve thoughtful attention. Often, they feel an obligation to their study participants to do justice to the full scope of their accounts, rather than the segments that may have made their way into their written research reports (O'Reilly & Kiyimba, 2015). And where data gathering exerts a particular strain upon vulnerable or special populations, tapping a high-quality data set for all you can seems both pragmatic and strategic. In an earlier discussion of secondary analysis, I proposed five ways in which secondary analysis might be used to advance knowledge in an applied field. These included analytic expansion, retrospective interpretation, armchair induction, cross-validation, and amplified sampling (Thorne, 1994). While the available opportunities have expanded over time with a more fulsome dialogue around methodological considerations, these general ways of thinking about advancing one's work beyond the single study remain relevant today (Heaton, 2019).

It is important to acknowledge, however, that there are numerous debates and controversies surrounding qualitative secondary analysis that warrant careful consideration before entering into the fray (Coltart, Henwood, & Shirani, 2013; Rug-giano & Perry, 2019). Chief among them are the problem of fit between the data and the research question and the absence of the kind of contextual data to which a primary researcher would have access (Hammersley, 2013). Other concerns have to do with the overuse of particular data sets, which may themselves have embedded biases or unrecognized limitations, and the potential where multiple data sources are used for disputes among primary and secondary researchers with respect to the legitimacy of conclusions that can be drawn (Thorne, 2013b). Thus, although secondary analysis offers considerable potential for putting good data to even better use, and interpretive description provides a viable approach to the design and conduct of a secondary analysis study, the methodological guidance and direction that will ensure its quality remain a work in progress (Chatfield, 2020).

### **Qualitative Metasynthesis**

The rapid proliferation of bodies of qualitatively derived findings within health sciences and the practice disciplines over the last generation has led a number

of scholars to consider how best to synthesize the accumulated findings from them. Methodology for systematic review and synthesis on the basis of quantitative research has been well established on an international collaborative basis through the Cochrane Library. Synthesis in the qualitative context has been slower to develop.

One key reason for this is that it is difficult to work out how best to “sum up” diverse products such as those that derive from the various qualitative research traditions (Sandelowski, Docherty, & Emden, 1997). As might be anticipated, a pure version of phenomenology looks dramatically different from the product of a grounded theory; they are talking different languages, privileging entirely different aspects of thought and action, and ultimately aiming toward quite different purposes. However, despite the methodological claims with which they identify themselves, a great many qualitative research reports produced to meet the knowledge needs of the applied disciplines will have departed significantly from their original methodological foundations and may in fact look much more like a generic qualitative description or an interpretive description report. This distance from the social theoretical underpinnings from which the conventional qualitative methods were derived provides an advantage for interpretive description (and related approaches) when it comes time to figuring out what one can do with a substantial collection of such studies.

These kinds of complexities have intrigued those who have taken up the challenge to work out qualitative metasynthesis methodology over recent decades and fueled some lively debates. Much of the original groundwork, which still inspires many of the current approaches, was developed for the social sciences by Noblit and Hare (1988). Although early efforts in the health field tended to address the “aggregation” of qualitatively derived reports (Estabrooks, Field, & Morse, 1994) or focused on the synthesis of small bodies of similar or linked studies (Jensen & Allen, 1996; Sherwood, 1999), the literature soon expanded to include an impressive array of sophisticated and strategic options for generating new knowledge on the basis of larger bodies of qualitative inquiry within a field (Finfgeld, 2003; Sandelowski & Barroso, 2007; Thorne et al., 2004).

More recently, the Cochrane Library has given its blessing to a mechanism for “qualitative evidence synthesis” (Gülmezoglu et al., 2013; Noyes et al., 2011). Beyond guidance on comprehensive search and retrieval strategies, that approach offers a measurement tool for the quality assessment component that has come to be known as AMSTAR (Shea et al., 2007). However, as the field advances from experimentation with qualitative synthesis approaches toward a more standardized option, new concerns arise with respect to what it all means (Thorne, 2022a). We’ll explore some of these concerns as we reflect on current trends in available options for qualitative metasynthesis as well as those with ambitions to extend integration across the full spectrum of methods.

### Synthesis Variations

As the metasynthesis methodology project evolves, so do the possibilities for how it might be conducted (Barnett-Page & Thomas, 2009; Hannes & Lockwood, 2012; Paterson, 2013; Thorne, 2015, 2017, 2019b, 2023). Although it may be something of an oversimplification, one way to think about the options is to categorize them as aggregative or integrative (Walsh & Downe, 2005). The aggregative methods include those that attempt to gather methodologically similar studies and combine their findings into a larger whole. They also include creative attempts to experiment with more summative approaches to understanding the weight of evidence for particular elements across the full range of studies (Sandelowski & Barroso, 2003b). At the more interpretive end of the spectrum, following in the Noblit and Hare (1988) tradition, various scholars have attempted to use metasynthesis for the purpose of conceptual translation and reintegration of diverse findings. An example of this is meta-study, adapted for the health field from a sociological tradition, in which integrative synthesis is predicated on a critical analysis of the theoretical and methodological history and traditions that have made up the available bodies of qualitatively derived knowledge (Paterson et al., 2001). Still others advocate combining both an empirical/analytical and a critical/discursive analytical read within a single metasynthesis process to counter some of the problems that have arisen in relation to the authenticity problem we referred to in Chapter 5 as the “crisis of representation” (Sandelowski, 2006).

If one accepts, as I have argued in Chapter 14, that qualitative products represent something quite different in the evidentiary domain than do quantitative research findings, then the potential problems associated with the aggregative approaches to qualitative metasynthesis become obvious. Beyond methodological variation, a collection of studies may well represent significant theoretical, disciplinary, spatial, and temporary variations, including those that can only be known by inference from a close reading. They may or may not have been directly informed by one another or generated on the basis of quite similar or different data sets. And since context is of unquestionable importance to the extraction of subjective and experiential material, the published reports may reflect any number of influences that are well beyond the analyst’s reach. Another worrisome issue within the aggregative style of metasynthesis is that proponents seem to presume that it affords some of the reliability and generalizability features familiar to the quantitative synthesis project (Korhonen et al., 2013). Toward that end, they advocate explicit rules around exclusion criteria, such that the field is often narrowed to a fraction of the available body of material (Shea et al., 2007). Further, they rely heavily on the use of standardized sets of “quality criteria,” typically formulated as compliance to one or another of a set of established checklists (Hannes, Lockwood, & Pearson, 2010). In keeping with the

checklist conventions, the products of these aggregative types of metasynthesis strongly emphasize the technical aspects of data retrieval and display. However, their findings tend not to extend much beyond a frequency count of the most obvious (and therefore superficial) themes common to the set of selected studies. Rarely do they reflect either analytic depth or critical reflection on variation (Thorne, 2015, 2023). Thus, in aspiring to achieve a kind of generalizability that compares favorably with the rule structures of the Cochrane synthesis evidence ideal, they typically fall short of generating meaningful “findings” in the sense of any newly integrated conceptualizations or ways of thinking about the phenomenon in question, and their actual contribution to new knowledge often seems questionable.

In contrast, metasynthesis projects in the more interpretive tradition tend to be far less exclusionary in their selection of primary studies, recognizing the wide range of conditions that may explain the presence or absence of many of the conventional checklist items. They tend to be considerably more skeptical of the role of quality measures as a priority selection factor, not because they discount the idea of quality but because they recognize that potentially interesting perspectives may well be hidden within incomplete or methodologically idiosyncratic study reports (Thorne, 2009, 2023). Typically, they see the value in the widest possible range of primary studies as data sources, recognizing that narrowing the field inevitably jeopardizes representation and obscures the voices of the full spectrum of the research community (Sandelowski, 2006, 2014; Xu, 2008). In this context, the comprehensiveness of the data retrieval exercise and the reliable documentation of inclusion criteria are considerably less meaningful to the quality of the ultimate product than is the interpretive depth the analyst is able to demonstrate, including the capacity to dig deeply within the original claims about findings to unravel the various conditions and contexts within which they were originally produced and to draw interpretive conclusions as to what that means for the field. A fully developed integrative metasynthesis will be one that discursively (not literally) scrutinizes not only the commonalities among the available studies but also the diversities between them (Booth et al., 2013). It allows for a set of findings that can be thoughtfully situated within the historical and social contexts of the scholarly communities from which the work has arisen. And in so doing, it can often tell us a great deal that is worth knowing.

The methodological developments that have taken place and remain underway in the qualitative metasynthesis field make it clear that work of this nature is not simply a convenient way to generate new findings without the “dirty work” of having to gather original qualitative data. Although one may find published examples of smaller and more technically oriented qualitative metasynthesis reports, I hope these will begin to disappear as viable qualitative enterprises in favor of the more robust and informative products that arise from the more comprehensive and integrative variety. Done well, qualitative metasynthesis

is a complex, demanding, and sophisticated form of scholarship and can offer powerful new possibilities in building up the subjective and experiential knowledge required to enact our applied and practice fields.

### Research Integration

A related development within the methodological literature involves taking up the challenge of research integration in the broader sense (Bammer et al., 2020). Although this began with an interest in working out how to incorporate qualitative data into formal evidence synthesis processes, it then evolved into systematic, explicit, and reproducible techniques to combine what is known on the basis of diverse methods in a manner that permits both descriptive and prescriptive aggregation (Forbes & Griffiths, 2002; Pearson, 2004). Although the methodological challenges are significant, important advances in this area have helped us move beyond the traditional competing camps of relativism and positivism:

On the one hand, we could have produced a clearly defined epistemological vacuum, represented by the failure to identify evidence convincing to the positivist. Alternatively, we could have filled the vacuum with constructions of reality ... with no external verification or consideration of the extent to which this captured the “real” world.

*(Forbes & Griffiths, 2002, p. 153)*

Harden and Thomas (2005) described a “mixed methods” approach to systematic review that capitalizes on emerging approaches within both conventional quantitative systematic review and qualitative metasynthesis to extend beyond “what works” to “why.” Their approach involved a constant comparative analysis between descriptive and analytic themes, searching for matches, mismatches, and gaps between recommendations and demonstrable effect sizes within a particular field. Recognizing that the forms of research across the spectrum were becoming increasingly diverse and that conventional systematic reviews had focused on narrowing down the focus rather than embracing that diversity, they advocated moving beyond the qualitative and quantitative labels toward a focus on distinct kinds of research questions as drivers of epistemologically distinct forms of knowledge, all of which are relevant for comprehensive understanding. The idea of mixed methods synthesis has evolved over the years and become formalized into distinct approaches depending on the degree to which the analysis is “segregated” or “integrated.” It also involves the possibility of “contingent designs” in which two or more syntheses are conducted sequentially based on the results from the prior synthesis (Pearson et al., 2015).

Bammer and colleagues (2020) see this kind of work as especially relevant to tackling the most complex and difficult problems of our modern world, such

as reducing the economic gap between the global north and south or achieving sustainable socio-ecological systems. They understand some participants in a research integration as bringing the skills of “knowing-that,” including what is required to deal with complex problems in an integrated manner, how to look for interconnections with other problems, and how to explore related political, economic, or historical circumstances. In contrast, others on the research integration team will bring “knowing-how,” including which methods or processes to use in a particular context, such as building a model to describe the problem or how to engage decision-makers in discussing research results, and have skill in enacting those methods and processes. The wonderfully rich and creatively evolving body of thought in this field suggests great promise for the future, when the passion and enthusiasm that fuel the qualitative inquiry can be harnessed and applied with other forms of knowledge into an integrated and comprehensive way of viewing the world, with all of its complexities intact.

# 17

## KNOWLEDGE IN ACTION

For the applied and practice disciplines, research is not simply an end in itself, but rather a means toward something bigger, better, stronger, deeper, or more critically informed than the status quo. Thus, the motivation for ensuring that the fruits of our research are making a contribution to that applied knowledge enterprise rather than simply sitting on a dusty shelf is built right into the research act from the outset. Interpretive description as an approach to the study of qualitative kinds of questions is an explicit claim that one is purposeful in one's research toward the kind of engagement in the world that our various professions and disciplines stand for. This means that the kinds of activities we are referring to when we talk about knowledge translation have been built into the very inspiration for our project, as well as integrated throughout its design and implementation, and not simply tacked onto the end as an afterthought.

In these final chapters, we will reflect back on earlier discussions of the kinds of study design elements that will come into action as we move toward the larger aim of ensuring that the knowledge we generate for use in practice finds its way into the places that matter. We will also review some of the sorts of issues and priorities for which a knowledge uptake motivation from the outset is shaping the strategic action components of our research designs. We will situate this discussion within the larger evolving context of how our scholarly communities are thinking about implementation science. And I will share something of my personal experiences and observations related to building capacity for interaction between interpretive description and social change. Tying this all together, we'll conclude the book by returning to the passion that brought us into the research approach in the first place—working within practice disciplines to try to expand knowledge that has the potential of making a difference.

## Implementation Science

Although researchers typically spend a lot of time justifying the need for more knowledge, it is widely recognized that far less attention has been paid over time to the problem of putting to use the knowledge that we already have (Bauer & Kirchner, 2020; Grimshaw et al., 2012; Straus, Tetroe, & Graham, 2009). However, as the gap between evidence and decision-making has become all too problematic, many creative thinkers have contributed greatly to our capacity to think about, communicate, and do something about the challenge. In this context, a vast array of terms and concepts have been used to work at elements of the problem. Among them are *research utilization*, *diffusion of innovations*, *evidence-based quality improvement*, *knowledge translation*, *integrated knowledge translation*, *knowledge transfer*, *knowledge exchange*, *knowledge brokering*, and *knowledge-to-action*. The preferred term may be entirely context dependent, as funding bodies and professional organizations organize around efforts to deal with the knowledge use problem (Nguyen et al., 2020). And in many instances, the terminology is hotly contested by virtue of the distinct philosophical and ideological implications it can convey with respect to matters such as who owns the knowledge and what constitute the barriers to its uptake (Greenhalgh & Wieringa, 2011). Terms like *implementation science* are also extending into common use, sometimes used interchangeably and at other times used to reference the study of all of these processes collectively and in a diversity of stakeholder contexts. It is also important to clarify what knowledge integration is not in this context. *Commercialization* and *technology transfer* do sometimes (and in some applied fields) get tangled into these conversations (Straus, Tetroe, & Graham, 2009), but for our purposes here we are oriented toward the kinds of knowledge that were envisioned in the first place as knowledge intended for disciplinary practice and application purposes.

In the conventional biomedical sense, the term *translational research* was used to differentiate the kind of inquiry that focused on bringing the new discoveries wrought by scientific research into the practice environment (Zerhouni, 2005). As the call for advancing the idea has evolved, and despite its complexity and effort, large-scale uptake of innovation has emerged as a specialty inquiry field in its own right. Implementation science is notoriously complex and messy (Graham et al., 2006), involving developing a comprehensive understanding of the diverse and intersecting barriers to such changes and the development of elaborate frameworks within which those thinking about knowledge integration efforts can strive to identify, manage, and work through all of those complexities (Bauer & Kirchner, 2020; Rapport et al., 2018). As it evolves, scholars across all applied and practice disciplines will be influenced by the consensus understandings surrounding strategic priorities and competencies required to engage in this type of initiative. They will also continue to challenge the field with respect to

how to integrate such aspirations as health equity into implementation science models (Baumann & Cabassa, 2020).

Finally, although much of the implementation science agenda has revolved around complexities such as measurement, I think we will also need the capacity within this larger initiative to critically reflect, interpret, and understand. In this, I see a potential role for applied qualitative methods such as interpretive description to become part of the larger processes within which we take the principles and mechanisms gleaned from the wider efforts into the context of our smaller initiatives and become better at asking the right questions to uncover possible paths forward.

### **Knowledge Transfer and Exchange**

Beyond the specialty fields of large-scale innovation diffusion, scale-up, and system change, it is important to remember that there will always be many layers of engagement and activity within which putting knowledge into the more local practice context will have relevance. When we have an awareness of the larger context within which the knowledge integration agenda is being played out in our fields, we can be better informed as to system drivers, contextual barriers, and sources of support we might bring to bear in our own particular worlds of trying to enact change.

Because an interpretive description study is built upon a solid foundation of knowledge of the field and critical reflection of the available literature, putting one's applied research to use extends well beyond the act of disseminating study findings. By engaging in the full process of a thoughtful applied qualitative project from the very beginning of study design and bringing meaningful findings through to an interpretive conclusion that engages the stakeholders you have intended to address, you may well be in an ideal position to consider the larger challenge associated with integrating knowledge into the practice context throughout the entire enterprise. In this, I see many opportunities to think about knowledge integration and to have that thinking inform all elements of study design. This means not only orienting studies toward those issues within which they may have the possibility of influence but also building research careers that explicitly and purposefully extend beyond the halls of academe and into the collaborative community or practice environment.

Despite the general challenges of research utilization and knowledge transfer, there is much that thoughtfully planned and conducted qualitative approaches can do to contribute directly to the practice context (Sandelowski et al., 2006). In the health field, for example, many studies are designed for the explicit purpose of uncovering more refined understandings of a health problem from the particular standpoint of the patient. If they are effectively grounded in an informed practice reality, then part of the justification for the study ought to be

a reasonable estimation that there is a clinical practice community that wants to know more about this group of patients or that it can be enticed into learning what it did not think it was missing. When an interpretive description is done well, it not only documents what patients tell us but also digs below the surface of those tellings to uncover elements of the experience that may help us think entirely differently about the difficulties that they encounter in our care contexts. Because a contextual understanding is fundamental to interpretive description, the findings will have excavated those most vexing aspects of the care context, reframed them into something meaningful, and created alternatives for practice. It has not proven helpful to assume that the obligation rests with the clinical practice community to seek out and apply our research; rather, it is our duty to ensure that our research is conducted in such a manner that its results will be relevant and meaningful and that we fulfill our knowledge dissemination and integration commitment in the manner that is most likely to entice the opinion leaders within our practice community to “see the light.”

A second way in which our findings can be put to use is in contextualizing and complicating the findings that have derived from quantitative studies. In many instances, population-based studies report behavior patterns but offer no mechanism other than conjecture to explain them. Because of this, studies documenting patterns that appear “irrational” create tensions between the research and the practice community or the public at large. As we know, that which can be documented quantitatively has often been stripped of meaningful variables within its natural context. An increasingly sophisticated reading audience, including the general public, is capable of reflecting critically on this and entertaining competing explanations. In this way, strategically directed qualitative research can enlighten the evidence and application discourses, as well as ensure that the power of numerical evidence is properly harnessed.

A third mechanism, and one that ought not be underestimated, is what Sandelowski has called “symbolic utilization.” By this, she is orienting us toward situations within which qualitative research findings can be used as “a persuasive or political tool to legitimate a position or practice” (2004b, p. 1371). Within the context of the applied disciplines, this has particular appeal for those important practices that are not—and are not ever likely to be—amenable to measurement or quantification, and therefore may be at risk in the context of an overly enthusiastic evidence-based agenda. For example, cost-cutting through staff reduction is an ongoing concern within health care. Although it is notoriously difficult to draw causal associations between health care communication and patient outcomes, interpretive descriptions of how that human element of the care encounter informs the patient, prevents predictable problems, enhances service delivery, and mobilizes hope may help organizational decision-makers to acknowledge the inherent value and probable cost-effectiveness of attending to such slippery conditions as staff stability.

Thinking through the various possibilities of how the applied qualitative researcher can work with knowledge in the conceptualization, conduct, and follow-up to every study, there seems to be an infinite range of possibilities for meaningful engagement. Toward this end, we will briefly review three key ways in which this kind of integration in action can be realized.

### **Knowledge Transfer Projects**

A self-evident mechanism for building application into the conceptualization of a research project or program of research is the kind of activity we might call a knowledge transfer project. In response to the knowledge-practice gap, research funding bodies and others with influence in the research environment have been attempting to ensure a return on investment by asking researchers to build some form of knowledge transfer component into their applied research. Thus, beyond a commitment to the dissemination of results to their fellow researchers, those who will be successful in the research environment will increasingly be those who have learned how to constructively and meaningfully engage with partners from their practice fields and other stakeholders associated with the eventual sites of knowledge relevance. More and more we see scholars exploring creative and innovative methodologies as ways to become involved in projects and initiatives that will set the stage for an ongoing knowledge transfer capacity. While these kinds of knowledge transfer projects may not have the scope or vision of the major initiatives aimed at system transformation, at the more local level they can sometimes be truly transformative.

In our considerations of novel data collection strategies in Chapter 7, we referenced the manner in which some applied qualitative researchers have moved into various arts-based strategies, used visual or other sensory stimuli, and experimented with social media and other digital environments as engagement mechanisms within their fundamental study design. In some instances, they are anticipating knowledge transfer projects from the outset as a way to take their eventual findings forward, and with the benefit of a ready community of engaged and committed participants to assist in that process. By integrating an activity such as playbuilding or photographic displays into the core framework of a study, the idea is that you have generated an engaged partnership while also setting the stage for knowledge discoveries and have a platform from which to showcase that which was learned on completion (Norris, Hobbs, & Mirror Theatre, 2024). A similarly participatory element can be built into the design of social media and web-based approaches (Hays, Spiers, & Paterson, 2015; Lohan et al., 2015). Such projects clearly require know-how with regard to the project activities and a clear plan of action so that they neither overwhelm the research component of the activity nor get overwhelmed by it. They also typically require

new kinds of interdisciplinary and skillset collaborations, which themselves can fuel new and different ways of thinking about a project. The key to keeping such projects on track, and not becoming overly dazzled by the fancy bells and whistles, is the underlying applied disciplinary commitment within which they are designed to make a contribution. The core philosophical grounding of interpretive description within the knowledge aims of an applied and practice discipline makes it an ideal methodological partner to any of these novel approaches.

### **Working with Practice Partners**

Understanding the value and benefit of working in partnership with the persons, systems, and stakeholders for whom the study and its findings may have relevance opens up a wide range of options for how to enact that engagement. Sometimes it occurs at the level of inviting practice professionals to have active involvement within ongoing programs of research and creating research teams that capitalize on the differential skills and talents of diverse members. In other instances, the researcher might be open to being available to teams of practitioners working together to solve practice site or even system-level problems. Since the high aspirations of applied practice teams may not always match their capacity to see a project through, the scholarly generosity of an experienced researcher can make all the difference. In some contexts, blended teams of researchers and practitioners are facilitated by infrastructure, such as in the context of practice-based research units within which the needs of the practice community explicitly drive and support the activities of the researchers.

Because it has not always been easy for members of the research community to find optimal ways to package their findings that are relevant and meaningful to the practice sector, or to appreciate the compelling barriers to the application of research findings, building in active partnerships across the research-practice divide can be a powerful emerging way to bridge the two worlds (Wine et al., 2022). From the perspective of doing interpretive description research, active ongoing engagement in this kind of activity provides a tremendous advantage in exposing you to the experiential reality of those “inside” and to informing your ongoing interpretive understanding of the larger social, historical, and cultural context within which practice occurs. Further, this level of engagement can enhance the angle of vision with which you can identify and work with relevant research questions.

Because it is well understood that good fences make good neighbors, and the potential for disputes within partnerships is heightened in the context of diversity, a successful partnership may be contingent on recognizing that service and academic cultures are associated with different expectations, assumptions, and rules of engagement that can be fundamental to the success of a partnership

(Brush et al., 2020; Regan et al., 2009). As a general principle in practice partnership projects, it is essential to invite and welcome lively and respectful dialogue around such points of tension. While formal partnership agreements can be helpful in recording explicit expectations associated with the project, it is also wise to ensure sufficient fluidity in the process for revisions should the insights arising from ongoing dialogue and/or conflict resolution processes allow for more informed options as the implications of the agreement become more evident over the course of the project.

### **Participatory and Collaborative Research**

Beyond the incorporation of partners from user or target communities into our knowledge application projects, the idea of participatory and/or collaborative partnerships deserves special consideration. Originating in the community-based and academically supported political activism of 1970s Latin America (Fals-Borda, 1985; Friere, 1970), participatory action research has been a favorite of those who are working with marginalized, vulnerable, and particularly sensitive groups in the health fields (Higginbottom & Liamputtong, 2015; Salmon, Browne, & Pederson, 2010).

Participatory studies are those characterized by community engagement from the outset and across every phase of a study through to knowledge integration and beyond. They depart from the model of study in which a researcher enters the field with a problem, idea, or agenda, and then might integrate community partners into the implementation of the project in that they begin with establishing a population or community partnership prior to any of those steps. In this manner, any issue or problem that does develop into a research initiative is actually community driven from the outset (Montoya & Kent, 2011). Many of the barriers that have been identified in relation to research-based knowledge transfer and uptake are directly addressed by virtue of a community's commitment to framing the questions and building the methodology toward an aspect in which the need for change has already been established. As such, participatory studies build in a sustainability potential that has made them an attractive option for those who seek to make a lasting difference through their applied research efforts (Whiteford & Vindrola-Padros, 2015).

While the ideals inspiring participatory projects are indeed laudable, a serious word of caution is advisable before launching into them. Making premature commitments that your study will have a participatory flavor or referencing the lexicon of collaboratory terminology too loosely in your planning process can set up expectations you may not be able to live up to. The well-known history of appropriating data in the context of studying vulnerable groups has led to a natural sophistication within many communities with respect to issues of power and

control (Crosschild et al., 2021). If you do not intend to relinquish the complete control most researchers enjoy over such issues as the use of your data, decisions in the conduct of the study, or the dissemination of findings (including sometimes whether the findings will be disseminated at all), then it is unwise to position your study in a misleading manner.

In the community of scholars with an informed sensitivity to the research violations of the past, there is a strong code of honor with respect to integrity and clarity in such work. They recognize that the academy is inherently aligned with colonial power, for example, and maintains its uncontested place at the top of a “self-created hierarchy” in which it “rigidly defines epistemology” and is prescriptive as to what counts as reliable ways of knowing (Crosschild et al., 2021, p. 3). An example of this in health research is the “the patient-oriented narrative” that “has colonized most aspects of health sciences” (Turcotte, Holmes, & Murray, 2023, p. 706), requiring the involvement of patient partners within research teams across the spectrum but operating within a particular regime of established rules, norms, and truths with respect to what knowledge contributions they are actually permitted to make. In the extreme, according to Dazzo (2023), such research commitments toward decentering and decolonizing can unintentionally center and colonize. These kinds of critical reflections shed a strong light on the significant potential for harm within efforts that may assume themselves to be benevolent or beneficial to the reference communities (Hébert et al., 2015). Therefore, in this context, misrepresentations of intent can and do create pushback. And since beginning researchers, such as graduate students or early career scholars, may need to maintain a significant degree of control over timing, resources, and the eventual disposition of their study findings, full-on participatory action research may not be the best place to start.

All that said, applied qualitative researchers have entered their fields with an intention to make a difference, and if participatory methods are well suited to your communities of concern, excellent methodological advice is available to support the efforts (Higginbottom & Liamputtong, 2015, Fine & Torre, 2021). Interpretive description aligns well with such approaches in providing an organizational logic with which the actual design of the study can be collaboratively negotiated. And as the method does not bind to a “foreign” tradition, does not require an explicit theoretical commitment, and is so fundamentally applied in nature, it can help ensure that the conversation around what happens next is grounded in transparent and auditable decision-making processes.

Thus, as has likely been evident throughout this book, I see interpretive description less as a discrete research method and more as a methodological philosophy that will guide you through to the kind of study that best serves the question you are asking, the practice contexts and disciplinary groundings within which you are asking it, and the audiences that are most needing to have

your eventual answers. It is an invitation for applied and practice researchers to think from their disciplinary core, to advance knowledge in a direction that has potential for impact, and to see their responsibility as much more than simply the conduct of a good study. In my career I have witnessed many wonderful researchers doing wonderful qualitative work and advancing that work forward to make a meaningful impact on some problem or population of concern. Interpretive description is my attempt to capture the logic of what it is that makes that kind of work wonderful.

# 18

## POST-SCRIPT

### Looking Forward with Optimism

In the course of my nursing career, I have had the privilege of witnessing some fairly momentous shifts in thinking within my own fields of professional activity. Although I claim no particular part in having influenced any of them in a meaningful way, my experience has profoundly confirmed my conviction that the knowledge one can obtain through research methods such as interpretive description can and should find a place within the larger community of evidence-based decision-making.

When I first approached the study of chronic illness, I approached it as a “living with” sort of problem, assuming that I could set aside medical management and health care system involvement as somewhat incidental to the challenge of “living with” and focus my attention entirely on what was happening within the lives of those affected and their families. However, participants in my very first study in 1982 told me in no uncertain terms that their engagement with the health care system, and with the practitioners within it, was highly influential in determining what it was they had to “live with” and, further, that a surprisingly major component of their story had to do with the disjunctures and disruptions associated with obtaining appropriate care—this in a country (Canada) with universal health care.

Digging further into the subterranean depths of that tension, I came to appreciate that, from the perspective of those who lived with chronic illness, the health care system was both structurally and ideologically founded on a set of basic assumptions associated with acute and episodic illness visited upon people assumed to be essentially uninformed about what they needed and why (Thorne, 1993). These included the idea that patients needed to be protected from their poor judgment and that acute, not chronic, illness was the legitimate priority

of a health care system. By exposing these underlying value perceptions, the patient angle of vision helped me appreciate the pervasiveness and entrenchment of shared attitudes underlying what a health care system ought to be and how it ought to function. In this way, a conceptual synthesis of patient experiences based on a rigorous qualitative investigation produced a depiction of the way in which the larger society, with its science imperative and cost-constraint mentality, had inadvertently created a health care system that, by and large, failed to serve the pressing needs of persons with chronic illness and disability, and consequently its ultimate social mandate for population health. That way of seeing things, once obtained, becomes very difficult to shake. Over the years, my conviction strengthened as I saw evidence of these same values embedded across a wider range of global systems. Thus, an interpretive understanding, accessed by virtue of deep immersion with a purposive sample of “everyday philosophers” who had extensive subjective experiential knowledge of what it was like to have chronic illness in modern society, was and remains an important—almost paradigmatic—insight.

Clearly, my studies were merely minuscule drops in the bucket of converging conditions required to change the course of world events. However, they certainly opened my eyes to an increasingly insistent conversation brought about in part by the continuing work of many qualitative researchers within nursing and the allied health disciplines in documenting chronic illness experience across contexts and cultures (Thorne & Paterson, 2000). Further, they alerted me to the vital importance of working together in an expanded capacity with the epidemiological community to wrestle with population health data in such a manner that alternative interpretations of trends can be explored. Prior to this time, much of the relevant research and scholarship that might have informed the larger “chronic illness” knowledge base was obscured by the alignment of most researchers within “organ system” communities, such that scholars working in cardiac disease, cancer, kidney disease, rheumatology, and internal medicine were not yet understanding the inherent value in linking their analyses. Once human experiential patterns common to these distinct organ system conditions were effectively documented, a dialogic space was made for active consideration of the implications of these shared human elements of living with illness or impairment.

As various governments and policy communities came to conceptualize the enormity of the chronic illness problem, and subsequently to take note of how many of the costly, preventable sequelae were being mismanaged, the insight that current health care systems were fundamentally misaligned with the need began to take hold among the organ systems and population health specialists. Alternative approaches such as the Chronic Disease Management model (Wagner et al., 2001) began to appear in policy circles and became the foundation for system reengineering initiatives. While that model may still reflect something

of the professional orientation to chronic disease care, it begins to enhance an appreciation that the health care relationship—the interaction between the person with an illness and the professional health care provider who guards access to services—is the pivotal intersection between chronic disease management and everyday self-care decision-making. And as time marches on, reflective health care practice as a powerful determinant of what makes models of chronic illness care effective is starting to turn up in the evidentiary literature (Davy et al., 2015; Sherwood & McNeill, 2017).

Years later, it happened that my country created legislation allowing medical assistance in dying, including eligibility for those for whom natural death was not reasonably foreseeable but whose suffering had not been relieved by available systems and services (Pesut et al., 2021). This has, of course, exposed the enormity of the gap between what many persons with chronic and persistent conditions have always needed and what our health care system and social services systems have prioritized. Further, because assisted death is inherently morally and ethically complex, as well as politically and publicly contentious, we now have governments and health authority leaders seeking out researchers, including those whose research surfaces the perspectives of those with lived experience of various kinds, to help them work through the complexities of setting up systems and services and guidelines that will increase the likelihood of “getting it right” for all concerned. In that common desire for a coherent and ethical system of care, we begin to see a coordinated collective mindset as to how things might be different in an ideal future.

At this stage in my career, because I have the privilege of being included at certain policy-making tables and planning discussions, I have access to the human and evidentiary underpinnings upon which such processes play out. I am fully aware that no single interpretive description study or research program could have directly influenced meaningful change. However, I remain convinced that the hard work of applied qualitative health researchers everywhere, in uncovering and validating these important perspectival matters, has built a health care consciousness within which new ways of doing business make sense and can be adopted. Essentially, health care professionals need confidence that what they are doing is what’s right for patients and for the general public. These insights about radical reconfiguration of how we think about and work with chronic illness are consistent with that objective.

The lesson in this account is that interpretive description (for my early studies were such, even when they referenced naturalistic inquiry or other approaches as the best available alternative for articulating their orientation) is a powerful means for surfacing some important and otherwise invisible dimensions of human experience, stimulating a kind of awareness that has the potential to inform thinking and guide disciplinary practice. Over the years that I have worked within the chronic illness field, I have witnessed many changes in the

ways in which practitioners interact with their patients and, increasingly, these changes are justified on the basis of the confirmatory evidence that has arisen from the rich and exciting products of qualitative inquiry. On its own merits, interpretive description has little likelihood of directly influencing system-level change, yet it provides an important tool for ensuring that the perspective of those most deeply affected is accessible to the confluence of evidence deriving from multiple angles. Within any high-impact decision in the health care policy context, the patient perspective is now valued as a strategically important consideration, and patient-oriented research is fast becoming a policy driver (Stroscher et al., 2024). Because decision-makers are often uncertain about how best to access that perception, and representational politics becomes a major stumbling block within policy processes, I believe that elevating the patient perspective to the policy platform through rigorous empirical processes is among the most important roles that interpretive description can take on. By systematically surfacing those aspects of reality that are played out in human experience, we illuminate their intricate and marvelous patterns, rendering inherent complexities into a coherence that informs.

For those of us fortunate enough to have found an applied discipline whose social purpose inspires and motivates us, contributing to the generation of new disciplinary knowledge is a privilege of profound consequence. Within our applied disciplinary communities, we have entered into the exhilarating prospect of developing an evidentiary basis upon which to wrestle with complex human phenomena, uncover the intricacies of their contextual and relational components, and forecast the effects of various solutions upon the kinds of problems we collectively face. We confront this challenge armed with an increasingly sophisticated set of inquiry tools designed to guide applied researchers in the generation of meaningful and essentially useful new knowledge in the service of these disciplinary projects. Interpretive description is an invitation toward the audacity of imagining that we might begin to answer some of our most pressing questions about the mysteries of human experience.

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