

Educational Research Methods

Study guide Part 2: Qualitative methods

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Goals of the course

After completing the course, the student is able to:

Identify the various steps of the qualitative research cycle

Describe and critically appraise various qualitative methods and designs. Perform a literature search, credit sources and interpret a systematic review of the literature.

Design, evaluate and report on qualitative, educational research projects.

Acknowledge academic integrity and avoid plagiarism

Content of the course

Educational Research Methods: Theoretical Part

We will discuss and apply various steps of the research process against the background of the qualitative research cycle.

This includes:

- (1) developing questions and theoretical frameworks;
- (2) selecting a sample;
- (3) data collection techniques: observation, interviews, the use of unobtrusive measures;
- (4) selecting the research design;
- (5) elementary qualitative data analysis;
- (6) reporting the results.

Students are stimulated to bring in examples of specific educational research. The course also covers criteria for the critical appraisal of qualitative, educational research and highlights standards for reporting developed for different research designs.

Special attention is paid to academic integrity and avoiding plagiarism.

Educational Research Methods: Exercises and Assignments

The practical part of this course consists of two major components: practical exercises in data collection techniques and qualitative data analysis and training in crediting sources by means of APA guidelines. The latter includes attending a visit to the library to gain a better understanding on how to search for literature.

Evaluation

Type: Continuous assessment without exam during the examination period

Learning material: Course material provided on the online learning platform TOLEDO

Evaluation model for the qualitative component of the course: Research Portfolio

For the qualitative component of the course, students will create a research portfolio on an individual basis.

The research portfolio consists of two parts:

A **practical part** where you have to show that you can apply the theory into practice:

- Written philosophical stance and positional statement;
- Identification of the research phenomenon; Formulation of research questions; Integrating theoretical and conceptual frameworks;
- Deciding on a sample and a setting and developing a strategy to approach your target group;
- Choosing a design, data collection, analytical and interpretation techniques;
- Writing about qualitative research (process and product).

A **reflection part** where you critically reflect on your own learning process and your learning goals:

- What were the obstacles/difficulties you came across while conducting your research?
- What are issues and skills you still have to work on, with regards to future, similar exercises?
- Links to the theoretical knowledge (cf. lectures and handbook)
- Personal progress and learning agenda related to relational, academic, self-management and intellectual skills

The practical and reflection part have an equal weight in defining your final exam score (10/20 points).

The portfolio needs to be submitted on (communicated via Toledo).

Submitting the paper after the deadline results in NA (not attempted) (= 0/10).

The language and formal requirements of the assignment are graded separately as pass/fail.

Students who fail to pass the language and formal requirements will receive an NA (=0/10). The language and formal requirements include but are not limited to correct application of APA formatting rules (a.o., referencing style, reporting of figures and tables, reporting structure).

Second exam period:

In case the student fails one part of the examination, the grades for the part for which the student has passed are transferred to the exam period of September. Students who do not pass their research portfolio assignment have to individually improve their previously submitted version, including a letter to the didactical team describing the adjustments made.

Content of the portfolio: Storytelling Leuven – Diversity

Each year, the didactical team decides on a theme that serves as a source of inspiration for developing the research content for the practical part of your research portfolio. For the content of this year's portfolio, we opted for the theme '**Diversity and Storytelling Leuven**'.

This theme - diversity - is a broad theme. It gives you the opportunity to launch a personal topic that corresponds to your educational and research interests. For instance, you can choose a specific topic in the field of social-cultural work, arts & culture, adult education, special education, learning disabilities, gender equality in higher education, internationalization in higher education, etc. Your research topic should be framed within the context of Leuven (i.e., the city of Leuven or KU Leuven). You will conduct your qualitative research project in the broad region of Leuven. For example, you can study one of the many social-cultural initiatives that take place in Leuven or you can study trends or problems that manifest themselves at KU Leuven.

Activities

1. Lectures

During the lectures a selection of the concepts and strategies described in the book "Qualitative research: The essential guide to theory and practice" (cf. the section **Course material**) is discussed and examples are provided. You can find an overview of the lectures at the end of the study guide. The slides for the lectures will be put on TOLEDO. At regular time intervals a 'community of practice' moment will be embedded in the course module (see below for more information). During and at the end of each lecture, members of the didactical team are available for questions. The group discussions should focus on concrete, practical challenges encountered in the field or while conceptualizing the research project (i.e., portfolio assignment).

2. Practical sessions

During the first semester you were trained in crediting sources by means of APA guidelines. You will need this training for the portfolio assignment.

In the second semester, practical sessions on qualitative data collection techniques and qualitative data analysis will be provided. Also, exercises on the critical appraisal of qualitative research will be provided near the end of the course program. The materials for these practical sessions and exercises will be made available on TOLEDO.

3. Communities of practice

A 'community of practice' group consists of about 4 to 5 students. In a 'community of practice' students can discuss the choices made for and challenges met during the portfolio assignment in small groups. The focus in the 'community of practice' is on concrete, practical challenges within the individual research projects. The 'community of practice' is a reflection group and a 'life' discussion forum for the portfolio: students can also discuss how an assignment can be approached. In addition, they can discuss possible solutions for challenges met throughout the research process.

4. Developing a research portfolio

4.1 What is a portfolio?

A portfolio is a purposeful collection of materials, gathered by a student, that represents his/her efforts, progress, and achievements in a certain domain. It is the individual work of a single student. The concept 'portfolio' originates from 'portare' (to carry) and 'folio' (paper): a portfolio is a 'carrier of information'. A research portfolio is a coherent account of a student's learning process. It contains relevant evidence of research practices as well as critical reflection on the student's own functioning. A research portfolio allows a student to 'show' certain research competences, as well as general academic, relational, self-management and intellectual skills that the student uses when conducting research. The portfolio offers a dynamic way of portraying the growth process of a junior researcher, including 'evidence' of what the student did and learned, accompanied by reflection on the own functioning.

4.2 Goals of the portfolio assignment

For the qualitative part of your course module the goal is to 'become' a qualitative researcher. In the portfolio you can document your efforts and your progress in trying to achieve this goal.

The portfolio is used:

- to document the progress and the achieved level of qualitative research skills, and
- to assist students in taking responsibility for their own learning process through reflection and self-evaluation.

4.3 Structure of the portfolio

4.3.1 Overall structure

In the portfolio you can show that you are able to apply the techniques, strategies and concepts we discussed in the lectures to the practice of educational research. The overall structure of the research portfolio should be:

- | Brief introduction (and table of contents)
- | Research process:
 - a. Philosophical stance & positional statement: Research choices and lenses; Philosophical stance; Personal stance, positionality and reflexivity
 - b. Identifying the research phenomenon & formulating the research question(s):
 - The 'who' or 'what' of study; Research questions; Literature review; Theoretical and conceptual frameworks
 - Reflection
 - c. Sampling & data collection:
 - Time, place and participants; Sampling; Conduct at least one observation and at least one interview; Ethics
 - Reflection
 - d. Data analysis & interpretation:
 - Data handling and coding; Data analysis; Data Interpretation; Quality
 - Reflection
- | General (overarching) reflection on your efforts, progress, and achievements in becoming a qualitative researcher throughout this portfolio assignment
- | References (*APA guidelines!*)

4.3.2 Practical and reflection part

The research portfolio consists of two related parts: a practical part and a reflection part.

4.3.2.1 *Practical part*

In the practical part you should show that you are able to transfer and apply what we discussed in the lectures and what you read in the book "Qualitative research: The essential guide to theory and practice" (cf. the section **Course material**) to the practice of qualitative research.

This part should at least contain the following four sections:

- a. Philosophical stance; Positional statement
 - In this first section you can discuss your philosophical stance, your personal stance, your personal priorities, norms and values, as well as your

demographical and personal background: discuss how they influence the choices you make during the research process. You can choose to situate your research portfolio within a certain philosophical framework, and discuss the consistency between the philosophical framework and your choices in the research process (e.g., consistency between personal stance, research design, data collection and data analysis techniques). You can also discuss the relation between your philosophical stance and your personal stance: how do they influence one another?

- *Cf. the book of Savin-Baden and Major (2013): Chapter 3. Research choices and lenses; Chapter 4. Philosophical stance; Chapter 5. Personal stance, positionality and reflexivity*

b. Identifying the research phenomenon; Formulating your research question(s)

- In this second section, you should explicitly identify the phenomenon of your study and formulate your research question(s). It is recommended to describe the **process** of identifying the phenomenon as well as the **process** of formulating your research question(s). You should account for the choices you made. You can conduct a (brief) literature review on your research topic and use theoretical and/or conceptual frameworks for your qualitative study: describe them in this second section of the portfolio (in the fourth section of the portfolio, you will refer back to the literature review and the theoretical/conceptual frameworks). In order to answer the question what is the importance of your research, you can consult scientific literature. Frame your research within the field of educational research and discuss what can be the value of your research to the field of educational research. In the reflection part, you can discuss the process that preceded your choices.
- *Cf. the book of Savin-Baden and Major (2013): Chapter 6. The 'who' or 'what' of study; Chapter 7. Research questions; Chapter 8. Literature review; Chapter 9. Theoretical and conceptual frameworks*

c. Sampling and data collection

- This third section can be used to describe the time, place, and participants of your study. You can describe the population and sample, the sampling technique you used (cf. the chapter of Patton), and the data collection techniques you used. Again, you should account for the choices you made. It is recommended to describe your sampling and data collection **process**. The (potential) difficulties, obstacles and other personal experiences throughout this process can be your inspiration for the reflective part. In addition, you can discuss ethical issues involved in your study.
- For the data collection, you are expected to **conduct (yourself; on an individual basis) at least one observation and at least one interview** (this can be a one-on-one-interview or a group-interview such as a focus group interview), and to report on both the **process** of conducting an observation and the **process** of conducting an interview in the portfolio. You can add interview- and observation transcripts in an appendix. Make sure that you respect the ethical code related to each data collection technique. The various data collection techniques you use for your research project should not have the same weight or length. For instance, observation can be the main data collection approach for your study, and interviews can be additionally used to pursue certain 'leads' from the observation exercise. The other way around, interviews can be the main data collection approach for your study, and observation can be additionally used to study the setting and/or the participant(s). It is not imperative that the observation and interview are conducted in the same setting or with the same participant. However, it is important that there is some **coherence** between them with regards to your research **phenomenon** (cf. second section).
- *Cf. the book of Savin-Baden and Major (2013): Chapter 20. Time, place and participants; Chapter 21. Ethics and ethical approval; Chapter 22. Fieldwork; Chapter 23. Interviews; Chapter 24. Focus groups; Chapter 25. Observation; Chapter 26. Documents*

d. Data analysis and interpretation

- For this fourth section, you are supposed to analyze the data that you collected during the **observation and interview** (cf. third section). You can discuss the process of handling the collected data, coding them, analyzing them, and interpreting them. For instance, how did you become familiar with the collected data? Did you conduct the data analysis by hand or did you use qualitative software? Why? How exactly did you analyze the data? How exactly did you interpret the results? What are your interpretations? The transcripts of (group)interviews and/or your observational field notes can be added in an appendix. You can also add print-outs of your data analysis process (conducted by hand or with qualitative software) in order to document how you analyzed the data. Finally, you can discuss the quality of

your qualitative study. In your reflection you can discuss challenges encountered during the data analysis process.

- Cf. the book of Savin-Baden and Major (2013): Chapter 27. Data handling and coding; Chapter 28. Data analysis; Chapter 29. Data Interpretation; Chapter 30. Quality

In addition to these four sections, you are free to include other research related material in your portfolio. Adding extra material will not automatically result in a higher grade, but it can create extra learning potential. The research portfolio is your **personal work**. Use it to learn as much as possible about conducting qualitative research in the field of educational research. You can use Chapters 31 and 32 of the book of Savin-Baden and Major (2013) on 'how to write a research report' to structure your portfolio.

We want to stress the fact that a qualitative research process is not linear; sometimes, you will have to 'go back', reconsider a previous step, etc. It is important that this **process** is discussed in the portfolio! Accordingly, the steps in the qualitative research cycle are not as clear cut as they appear to be in theory. For instance, in qualitative research it is often the case that the data collection and data analysis run simultaneously. Some other examples are: the formulation of the research question(s) can change throughout the course of your study, the data analysis can lead you to conduct an additional data collection phase, learning about new techniques and approaches can lead to rethinking your philosophical stance, etc. Describe these choices, challenges, and processes in your research portfolio! In terms of reporting on your research project, try to reconstruct your research logic for the reader.

4.3.2.2 Reflection part

Reflection is meant to stimulate a process of 'looking back', critically reflect on your achievements so far and to evaluate and analyze your own actions. It is a natural process of thinking about the actions we took within the context of our research project, and about critical events we came across during the research project (i.e., events that triggered a reflection process, that concerned obstacles, or that stimulated our research process).

Reflection guards us against:

- A distorted judgment about our own functioning;
- A distorted judgment about other people's functioning;
- A lack of personal growth and development of research skills;
- The misbelief that you act correctly in situations where this is not the case;
- The ignorance and failure to understand the broad context that encompasses the research activities;
- The incapacity to separate feelings and objective facts;
- The incapacity to act.

Reflection can help us:

- To analyze in more depth our experiences in the process of developing our research competences;
- To structure our thinking;

To study, analyze, explain and evaluate our learning process, based on concrete experiences from practice;

To identify learning goals and to determine which actions we have to take in order to meet those learning goals.



In the reflection part you can discuss what you learned throughout the research process (based on a concrete event or action), what you learned about yourself (research skills, research interests), and whether or not there was a process of personal growth. A good reflection contains two layers.

FIRST REFLECTION LAYER

In the first layer you can discuss your personal development in the process of ‘becoming’ a qualitative researcher, what you learned about yourself (with regards to qualitative research skills), which of your qualitative research skills make you feel confident as a researcher, and which skills need further development. Reflection goes *beyond* looking back. It is also about looking forward and thinking about alternatives: What can you do different or better next time? Can you improve the link between the theory discussed in the lectures and your own research activities? What skills will you be working on? Try to master your own learning process in becoming a qualitative researcher, check whether you reached your goals, and set yourself new goals for the future. You will have to reflect during each step of the qualitative research cycle (i.e., from defining your research topic to interpreting the data you collected). The model of Boud can help you to structure your reflections:

Model of Boud

1.	Return	Return to the action	<i>What happened? What am I talking about? ...</i>
2.	Attend	Describe the feeling	<i>How did I feel? ...</i>
3.	Associate	Associate the information from the reflection to existing knowledge; Add comments and dialogue	<i>Why do I discuss these events / skills / competences? What was the essence of this research activity? ...</i>
4.	Integrate	Integrate this new knowledge to existing theory and knowledge	<i>Which theories, knowledge, and practical experiences did I use in this situation? ...</i>
5.	Validate	Use the new knowledge to evaluate your assumptions, focus on inconsistencies and contradictions between theory and practice	<i>What went well / less good? What was (a)typical? ...</i>
6.	Appropriate	Integrate the new knowledge into your future actions	<i>What would I do different next time? What did I learn? Which actions will I take in the future? ...</i>

SECOND REFLECTION LAYER

The second reflection layer is your **final reflection**. The final part of the portfolio should include a general (overarching) reflection on your efforts, progress, and achievements in becoming a qualitative researcher throughout the portfolio assignment. You can reflect on the things you learned during the portfolio assignment, and you can look forward (for instance, to next year).

We advise you to **set learning goals** for each step of the qualitative research cycle (cf. supra): think about the research skills you want to further develop. In this process, it is important to:

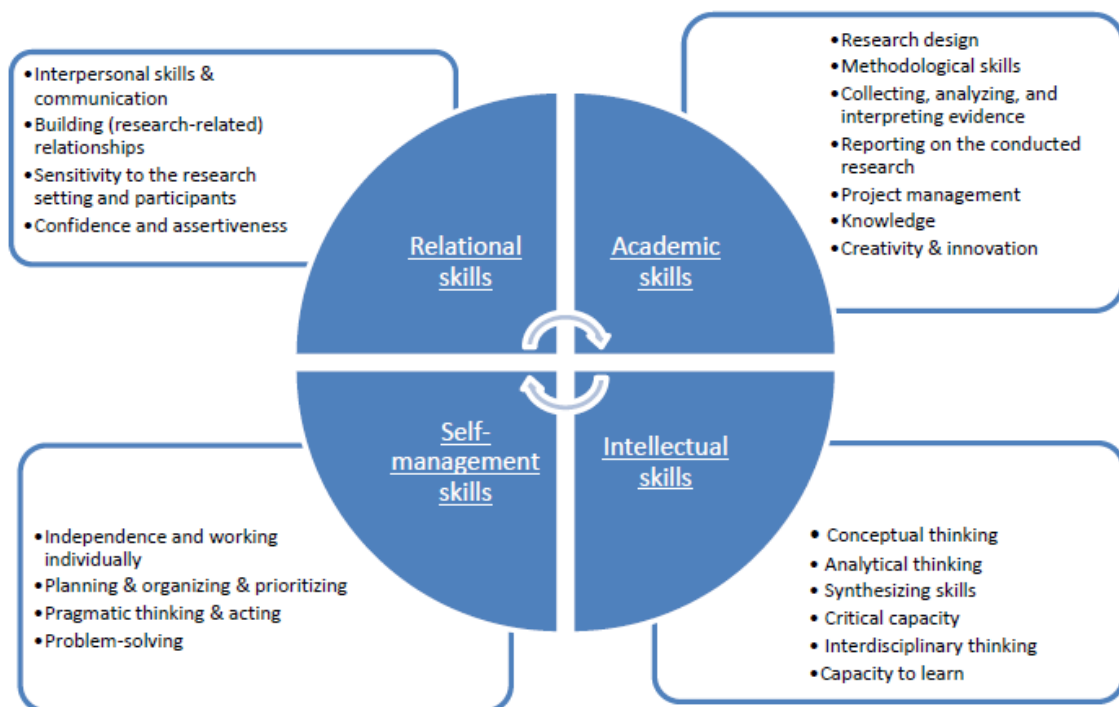
Consider your learning needs: *What do I have to know and/or what do I have to do for this step of the qualitative research cycle?*

Formulate concrete goals for yourself: *What do I want to learn during the portfolio assignment?*

Develop a plan to channel your research endeavor towards your learning goals: *What actions will allow me to generate the knowledge and skills that I want to achieve?*

Evaluate whether or not you reached your learning goals: *How effective was the learning experience? Did I achieve all of my learning goals?*

During the portfolio assignment, we hope you will develop several skills. We identify four groups of research skills: relational, academic, self-management and intellectual skills. You will need these skills next year (e.g., for writing research papers, for writing your master thesis), but also in your professional career. Accordingly, in your final reflection we expect you to evaluate your learning process throughout this semester, *and* that you look forward to future research endeavors as well as future learning goals with regards to relational, academic, self-management and intellectual skills: What do I *know* now and what *can* I now? What goals do I want to achieve? How can I achieve these learning goals.



Here are some questions that can help you in your final reflection:

Which relational, academic, self-management and intellectual skills did you develop or optimize during this second semester? For instance, you can discuss where you are now, how you judge your skill level, which growth processes you spotted, who/what helped you growing, and what were important learning moments or critical events?

How did you develop these skills? What can you do to further develop them? For instance, discuss which parts of the qualitative research cycle helped you to develop which skills, where you want to get, and how you plan to get there.

You can also discuss which parts of the portfolio assignment were the most interesting or challenging, and what you learned on your research topic. It is not a good idea to 'start' with the reflection at the end of the semester, right before you have to hand in the assignment. If you wait that long, you will have to dig deep in your memory. Furthermore, the reflection process will shape your research and your research decisions. We advise you to keep a **logbook** or **research diary**.

Here are some important considerations when critically looking back and analyzing your own actions:

- Recognize blind spots! Be honest about the skills and things you are less good at.
- When something did not go well, try not so much to blame the other(s) or the situation, but ask yourself: *What could I have done differently?*
- Gain insight in your (best) way of learning and researching.
- **Set learning goals, adjust them, and create new learning goals during the portfolio process:**
What do you want to achieve during the portfolio assignment?

4.4. Practical guidelines

- For the portfolio, we expect you to pay attention to **language** requirements, **spelling** and **grammar**, and encourage you strictly follow the **APA guidelines** (e.g., references, use of tables and figures; see *Educational Research Methods: Exercises and Assignments*. Use the font **Times New Roman (12)** and **1.5 line spacing**.
 - The portfolio should be around **20 pages** (excluding appendices).
 - **Hand in the report, in electronic as well as printed format:**
 - **Electronic format** (by e-mail: (contact person course module)): word- or pdf-version
 - **Printed format:** we prefer to have the report printed recto verso and stapled (nothing more: do not add plastic covers)
- ➔ **Both versions should reach us by (date communicated via TOLEDO).**

Course schedule

Date	Content
Feb	Introduction, portfolio, philosophical perspectives, research choices and lenses, communities of practice
Feb	Research cycle (qualitative), research questions, literature review, theoretical and conceptual frameworks, communities of Practice
Feb	Qualitative research approaches and designs (part I), communities of practice
Mar	Qualitative research approaches and designs (part II), communities of practice
Mar	Selecting a sample, collecting qualitative data (part I), communities of practice
Mar	Collecting qualitative data (part II) → Second part: Practical session
Mar	Collecting qualitative data (part III) → Second part: Practical session
Mar	Analyzing qualitative data (part I), communities of practice
Apr	Analyzing qualitative data (part II) → Practical session
May	Ethical issues in qualitative research, writing a qualitative research report, reporting standards, communities of practice
May	Quality, critical appraisal of qualitative research → Including exercises
May	Time for questions, communities of practice

Course material

Handbook (*cf. Acco*):

Savin-Baden, M., & Major, C. (2013). *Qualitative research: The essential guide to theory and practice*. London, England: Routledge.

TOLEDO:

Slides

Additional literature

Examples

Exercises

EE EDUCATIONAL RESEARCH METHODS EVALUATION FORM

Student name:
Student number:

PORTFOLIO

	U	S	G	E
1. Language, style and formal requirements	pass/fail			
The portfolio is presented in a well-structured manner (e.g., set-up) and can be understood without further elucidation.				
The formal requirements are met (e.g., APA-rules, font, spacing, format).				
The student uses academic language.				
2. Practical part	5 pt.			
Introduction				
The student introduces the portfolio. The student clearly describes the selected phenomenon, the research topic, the purpose of the study, and the research approach.				
Philosophical stance & positional statement				
The student explicitly positions him/herself within a philosophical perspective (i.e., articulates a philosophical stance), provides a rationale for the perspective, and consistently uses this perspective throughout the entire research project (i.e., methodological choices are consistent with the philosophical stance).				
In the positional statement the student explicitly discusses the personal stance, the researcher positionality (i.e., locate the researcher in relation to the topic, the participants, and the research context and process), research interests, personal beliefs, views, experiences, attitudes, norms, values, personal background, ... <i>in so far as they influence</i> the choices made throughout the research process.				
Identifying the research phenomenon & formulating the research question(s)				
The phenomenon of study is made explicit and a rationale is provided. The student has studied the phenomenon, and accounts for this by discussing scientific sources (i.e., brief literature review), theoretical and/or conceptual frameworks (consistent with the selected research approach). The research is framed within the field of educational research/practice/policy and the potential value of the research to the field of educational research/practice/policy is explicitly discussed.				
The research question(s) is (are) clear and focused. The question(s) is (are) consistent with the philosophical and personal lenses of the researcher, and with the phenomenon under investigation.				
The research question(s) is (are) formulated based on the subject area, the topic, the problem, and the study purpose (cf. Lesson 13). The subject area, the topic, the problem, the study purpose, and the research question(s) are explicitly discussed.				
Research approach/design				
The student selects one of the discussed qualitative research approaches/designs (cf. Lessons 14 & 15) and provides a clear rationale.				
The consistency between the research approach, the research question(s), and the philosophical stance is discussed.				
The research approach is applied properly and consistently throughout the portfolio. Any deviations from the basic principles of the approach are explicitly discussed and accounted for.				

Sampling & data collection				
•	The student selects and applies appropriate sampling and data collection techniques and provides a clear rationale for selecting the techniques. ¹			
•	The sampling and data collection techniques are consistent with the research approach, philosophical stance and research question(s).			
•	The sampling and data collection techniques are applied properly. ² Any deviations from the basic principles are explicitly discussed and accounted for.			
Data analysis & interpretation				
•	The student selects and applies appropriate data analysis and interpretation techniques and provides a clear rationale for selecting the techniques.			
•	The data analysis and interpretation techniques are consistent with the data collection, research approach, philosophical stance and research question(s).			
•	The data analysis and interpretation techniques are applied properly. Any deviations from the basic principles are explicitly discussed and accounted for.			
•	The research findings are described and reported in an accurate manner, consistent with the research approach, and provide a clear answer to the posed research question(s).			
•	The student discusses the strengths and weaknesses of the study, for instance based on the quality criteria that were discussed in the lectures. Applied strategies for ensuring quality are discussed.			
3. Reflection part				5 pt.
Critical attitude towards the research process and research skills				
•	The student describes the learning experiences and growth processes throughout the research project in an accurate manner. For instance, obstacles and difficulties that were met throughout the research project are discussed. Throughout every step and finding discussed in the portfolio, the difference between the scientific evidence (i.e., research data) and personal opinion is clear. Potential inconsistencies between theory (cf. lectures and handbook) and practice are discussed.			
•	The personal reflections, personal experiences, and personal growth processes throughout the research project are discussed in relation to the competences model (i.e., relational, academic, self-management and intellectual skills).			
•	The personal development in the process of becoming a qualitative researcher is discussed. Issues and skills the student still wants to work on, with regards to future, similar exercises, are discussed. These skills to improve on are clearly resulting from the reflection exercise. The student appeals to the theory (cf. lectures and handbook) when discussing alternatives and describing critical reflections.			

¹ For the data collection, students are expected to conduct at least one observation and at least one interview (this can be a one-on-one-interview or a group-interview such as a focus group interview). If students want to deviate from this, they have to explicitly ask for an exception (by email). At least two different data collection techniques should be included for each research project. Students can add interview guidelines, observation schemes, and interview- and observation transcripts in an appendix. The various data collection techniques used for a research project should not have the same weight or length.

² For instance, the ethical codes related to each data collection technique are respected (e.g., informed consent).

<ul style="list-style-type: none"> The student explicitly discusses learning needs, formulates concrete learning goals, develops a plan to channel the research endeavor towards the learning goals, implements (and reports on) concrete action, and evaluates whether or not the learning goals are reached. 				
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4. Overall score				
Language, style and formal requirements				
Substantive processing of the theory in the practical part				
Critical reflection				
Creativity				
FINAL SCORE				

U = Unsatisfactory; S = Satisfactory; G = Good; E = Excellent

Additional remarks: