

**University of Manitoba**  
**Faculty of Education**  
**Department of Educational Administration, Foundations and Psychology**  
**EDUA 7840 A01 – Qualitative Research Methods in Education**  
**Winter Term 2008**

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Office Hours: Monday, 9:00 - 10:30 a.m.; Wednesday, 4:00 - 5:30 p.m.; or by appointment

*Overview of the Course:*

In this course, you will study and practice using qualitative methods of research as they relate to education and to professional services about education. Most of your effort will focus on participant observation and in-depth interviewing—the two most common techniques in qualitative research—although some students may also wish to try group interviews or “focus” groups. To a lesser extent, you will also read about and discuss the general issues surrounding qualitative research. You will be responsible for designing a qualitative study, collecting and analyzing data, and writing an interpretation of it. Think of this course therefore as a lab course, with the lab located not at the university, but somewhere in the field.

We will also explore the ethics of conducting qualitative research. The focus of this exploration will be your own research study conducted for this course. As part of course requirements, you must submit a proposal to the University Research and Ethics Board and receive approval from it *prior* to proceeding with the rest of the course assignments.

*Text:*

Required for Purchase:

Bogdan, Robert & Biklen, Sari. (2007). *Qualitative Research for Education: Introduction To Theories and Methods*, 5<sup>th</sup> edition. Boston: Allyn & Bacon.

Supplementary References Available from the Instructor:

- Berg, B. (2007). *Qualitative Research Methods, 6<sup>th</sup> edition*. Boston: Allyn & Bacon.
- Glesne, C. (2006). *Becoming qualitative researchers: An introduction, 3<sup>rd</sup> edition*. Boston: Allyn & Bacon.
- Schram, T. H. (2003). *Conceptualizing qualitative inquiry: Mindwork for fieldwork in education and the social sciences*. Upper Saddle River, NJ: Pearson Education.
- Shank, G. D. (2006). *Qualitative research: A personal skills approach, 3<sup>rd</sup> edition*. Upper Saddle River, NJ: Pearson Education.

The supplementary references elaborate on topics or deal with topics for which there may be insufficient time in class, but which you may find helpful in completing your research. They are intended primarily to be consulted briefly or to be photocopied, but not to be kept for long periods.

There may also be additional articles to read from time to time.

*Summary of Course Assignments & Deadlines:*

<b>Assignment</b>	<b>Points</b>	<b>Due Date</b>
Ethics Application	10	Jan. 23
Observation	10	Feb. 6
Document Analysis	10	Feb. 27
Field Notes #1 & Memo	20	Mar. 5
Field Notes #2	15	Mar. 19
Field Notes #3	15	Apr. 11
Final Report	20	Apr. 11
<b>Total</b>	<b>100</b>	

*Detailed Description of Assignments:***Ethics Application** (10 points; deadline = Jan. 23)

You will complete the official Ethics Committee application form (part of this task involves preparing a one- to two-page description of your proposed study). You will be submitting the application to the Education Course Research Review Committee (EDCCRC) using the Education and Nursing Research and Ethics Board (ENREB) form, and cannot proceed with your main research project for the course without EDCCRC approval.

I will pass out the Ethics application in class, but note that they are also available online at:

<[http://www.umanitoba.ca/vpresearch/ors/human\\_ethics/forms.html](http://www.umanitoba.ca/vpresearch/ors/human_ethics/forms.html)>

In completing the Ethics application, be very explicit about the following:

- 1) making the purpose of your study or research question clear;
- 2) describing the design of your study (i.e. procedures and methods for collecting data);
- 3) naming all key participants and describing in detail how the participants will be recruited;
- 4) describing how the participants' privacy will be protected;
- 5) writing a consent letter(s) for participants in clear, simple language.

**Observation Assignment** (10 points; deadline = Feb. 6)

You will go to a PUBLIC place to conduct your observation. Public places include stores, restaurants, malls, parks, neighbourhoods, reception areas (hospitals, offices, hotels, etc.), but not places where membership is required (classes, fitness centres, churches). Preferably, try to find a place that is unfamiliar to you. Some suggestions might include stores that you don't usually go to (maternity clothes, Asian foods, fantasy games, etc.), or places/events you don't usually participate in (outdoor sports, children's events, etc.).

I want you to spend at least 20 minutes in the location and write down everything that you see, hear, taste, smell, touch, and everything that you feel. I want you to do this part of the assignment *alone*, and I want you to try to participate and blend in with your surroundings. I want you to be honest and descriptive. Type the notes afterwards in the form of field notes (we will discuss this in class and you can also refer to the guidelines attached). We will also use the field notes you generate for this assignment during our class on March 5 for an activity related to interpreting observations. Be ready to share the field notes and your thoughts in class.

**Document Analysis** (10 points; deadline = Feb. 27)

Step 1. Identify a public document, policy, or artifact that you work with or have worked with or are subject to. Choose a small section of that document, no more than a page. You must choose a document/artifact to analyze, one that will provide you with multiple vantage points and points of view. Here are some examples:

Web sites: educational sites, controversial sites.

Organizations and their advertisements

Advertisements

Events, descriptions, and rhetoric from museums, galleries, communities, etc.

Legal documents and decisions

Objects and photographs (if these are relevant to you)

Curriculum guides and resource books

Famous places and the rhetoric that describes them

Textbooks

Standardized Tests

Correspondence

Published academic disputes (e.g., public debates about EAL programs and funding)

Transcripts, records and educational plans

School rules and policies

Policy statements

Syllabi and University calendars

Step two. Use discourse analysis to examine the document or artifact in no more than six double-spaced pages. Limit yourself to an extract that can be analyzed in six pages, and attach a copy of the document/artifact to the assignment as an additional page. You must both “read with” the author (that is, understand the author's purpose, audience, context for writing, basic assumptions and policy tradition), and “read against” the author (that is, maintain a single theoretical standpoint like feminism, critical theory, or post-colonialism against which to read the text). It is far more difficult to “read with” an author than to “read against” him/her. Good policy criticism involves both processes.

**First Set of Field Notes, with Interpretive Memo** (20 points; deadline = Mar. 5)

This will be the first of three observations or interviews that you described as part of your research plan and ethics application. Prepare a complete set of field notes (including verbatim transcript for interviews). For practical reasons, I suggest that the observation or interview last no longer than one hour, but if it takes less than about 40 minutes, then something is wrong with your choice of participant, your interviewing technique, or both. Before beginning on this assignment, read the “Guidelines for Evaluating Field Notes” attached to the end of this course outline, because it contains more detailed information about my expectations.

Write a two- to three-page memo interpreting what you have heard or seen for this observation or interview. To do this, identify one or two “themes” or apparent trends in the data, and explain why the data support the themes or trends. Quote and cite from the data precisely as part of the interpretation.

**Second and Third Sets of Field Notes** (2 x 15 points; deadline = Mar. 19 & Apr. 11)

These assignments are the data from the remaining observations and/or interviews described in your research project and should be prepared as indicated above.

Turn in sets of notes (both peer-edited and otherwise) as soon as possible, but all three must be in by April 11th. The sooner that you turn in field notes, the sooner I will try to return them to you with comments.

**Final Interpretive Research Report** (20 points; deadline = Apr. 11)

For this assignment, write a report on your research study for this course. The organization of the report will vary somewhat depending on the type of project you do, but it will include a description of its purposes, its methods or procedures, and your findings and interpretations. We will discuss the writing process in class which will help you to get started. The report may overlap somewhat in content with initial “Interpretive Memo”; however, this information should be extended or reinterpreted in the light of more recent observation and reflection. Quote and cite examples from your data precisely. You should need no more than 20 pages for this assignment.

*General Comments About the Course:*

If you require any modifications to insure your full participation, please talk to me as soon as possible.

**U of M Policies**

University of Manitoba policies require that I draw your attention to the policies regarding academic dishonesty (plagiarism, cheating), incompletes, and reviews (appeals) of assignments and term grades. Please refer to the General Calendar for the details of these policies.

**Completing Assignments**

All assignments must be completed in order to pass the course. Please talk to me prior to the due date of assignments if you require an extension.

**Letter Grades**

I will use the following percentage equivalents in assigning final letter grades for the course:

A+	= 100-96%
A	= 95-90
B+	= 89-85
B	= 84-80
C+	= 79-75
C	= 74-70
D	= 69-60
F	= less than 60

*Schedule of Class Sessions*

<b>DATE</b>	<b>TOPIC</b>	<b>READING/ASSIGNMENT</b>
Jan. 9	Introduction Overview of Ethics Process ( <b>Dr. Stan Straw</b> ) Walk through Ethics Application	Chapter 1 Ethics application materials
Jan. 16	Research Design “Workshop” Ethics Applications (individual or small group feedback; successful examples; discussion re: specific wording and format, etc.)	Chapter 2
Jan. 23	Research Design (continued) <b>Guest #1</b>	Chapter 3 <b>*Ethics Application due</b>
Jan. 30	Data Collection (Observations)	Chapter 4
Feb. 6 (Joint class)	Data Collection (Interviews/Focus Groups)	Chapter 5 <b>*Observation due</b>
Feb. 13 (Joint class)	Data Collection (Document Analysis; explain assignment)	
<b>Feb. 20</b>	<b>Reading Week - No class</b>	
Feb. 27	Data Analysis (Interpreting Interviews) <b>Guest #2</b>	<b>*Document Analysis due</b>
Mar. 5	Data Analysis (Interpreting Observations)	Kouritzin (2002) <b>*Field Notes 1 &amp; Memo due</b>
<b>Mar. 7/8</b>	<b>Faculty of Education Graduate Student Symposium</b> (Attend one session – Friday evening, Saturday morning, or Saturday afternoon – and be prepared to report on the information in class)	
Mar. 12	Graduate Symposium Reports In-class Field Note Exchange	
Mar. 19	Other Approaches to Data Collection <b>Guest #3</b>	Chapter 7 <b>*Field Notes #2 due</b>
Mar. 26	Writing It Up <b>Guest #4</b>	Chapter 6
<b>Apr. 2</b>	<b>No class (in lieu of attending Graduate Student Symposium Mar. 7/8)</b>	
<b>Apr. 11</b>	<b>Wrap up (Metaphors of Qualitative Research) &amp; Potluck</b>	<b>*Field Notes #3 and Final Report</b>

**Guidelines: Making Field Notes or Transcripts of Interviews**  
(as developed by Dr. Kelvin Seifert)

In reading and commenting on your field notes and transcripts, pay attention to the following points:

1. **Format:** Here are the most important guidelines about format. Note that they differ significantly from the guidelines for typing “ordinary” term papers.
  - 1) Always typed and **always double-spaced.**
  - 2) Leave a wide (e.g. two-inch) margin on the right side of each page for annotations.
  - 3) Interviews should be recorded like a script – indicating change in speakers along the left margin (either by name/pseudonym, initials, or code), and supporting verbatim statements with explanatory comments or observations in brackets.
  - 4) Print line numbers along the left-hand margin. Most versions of Word and of other word-processing programs can do this, though you may never have had a reason to try it. Go to the “File” menu, then click on “Page Setup,” then click on “Line Numbers” and follow the instructions.
  - 5) Print on only one side of a page.
  - 6) Number and use an identifying header on every page, e.g. “Seifert, Transcript #2, page xx”).
  - 7) Devise a foolproof referencing system for citing particular quotations in your field notes or transcripts, and remember to use it wherever appropriate (e.g. on interpretive memos or when editing a peer’s transcript).
  
2. **Length:** In this course size and length do matter! A 60-minute interview, properly typed and formatted, should fill between 15 and 25 pages, depending on how fast your participant talks. A 60-minute participant observation, when described in sufficient detail and properly typed and formatted, should fill about 12 pages. (These amounts are for beginning observers—for practiced veterans, they can be much larger). If your transcripts or field notes do not approximate these amounts, then something is wrong, either in the transcription, the note-taking, in your rapport with a participant or in your questioning strategies. Do not hide the problem of length if it occurs; discuss it with me and/or with classmates if it happens.
  
3. **Background information:** At the beginning of the field notes or transcript, include all relevant background information about the setting, the participant, and your relationship to the participant. At a minimum this should include the following: time and date of observation or interview; duration of observation or interview; its location; any special conditions that influenced the observation or interview; the names and identifying information about the participant(s); and your relationship(s) to the participant(s). Often a half-page is about right for explaining background information, though sometimes it can be significantly more without being excessive. It does not hurt to be generous about background information, because you are not committed to using all of it later, during interpretation and analysis. Remember: if it is not recorded, it is not “data” and may be lost for research purposes.

4. **Interpretive comments distributed throughout:** For both field observations and interview transcripts, these can take two forms: 1) brief annotations in the (big, two-inch) margins that you have deliberately left, or 2) parenthetical “Observer Comments” scattered throughout the field notes, and labeled as such. The former are best used for naming or suggesting emerging concepts or themes; the latter are better for explaining your preliminary ideas about what the concepts or themes mean.
5. **For interviews: balance flexibility and moderate focus**—i.e. respond and support interviewees when they seem to get off topic, but also make reasonable (not pushy) efforts to get them back on track if or when needed. It is frustrating to finish an interview—even an enjoyable one—only to discover that you did not really talk about what you needed for your research project. On the other hand, you cannot really control what participants say during an interview, and sometimes, conversational tangents turn out to be more productive than the questions that you had planned. So be flexible and alert; it’s a judgment call.

Important: 1) Make sure your recording equipment is working properly! It’s OK to do a sound check at the beginning of an interview—your participants will understand the importance of that. 2) Allow lots of time to transcribe after the interview—2-4 hours for every hour of interview time is not out of line.

6. **For field observations: provide lots of detail**, even when you are not sure whether particular details will prove relevant later. Try to capture bits of actual language used (e.g. jargon, favorite expressions of the participant, etc.), or write down paraphrases of important statements or comments made during an observation. If you are doing a field observation instead of a sit-down, recorded interview, no one expects perfection about recording language (if you want perfectly transcribed language, then you should be doing a recorded interview instead). When doing a field observation, however, do try to note, how verbal comments connect with or are part of the overall scene that you are observing. Recorded interviews do not do this as well as field observations.

Important: Make every effort to record field notes as soon as possible following an observation! Memory declines rapidly after the observation, and it shows in the field notes as lack of plausible detail. Allow ample time after the observation to record the field notes—usually much longer than the observation itself.

## Editing and Feedback

You will be getting feedback on your work from me or from your classmate partner for the editing assignment. The following points describe the sorts of responses that have proved helpful to other students in this course, and that I will try to provide to the extent that my time and energy permits. They are also the sorts of responses that you should try to provide when editing a partner's field notes or transcript. Note that your main job, as editor, is not just to offer lots of support to your partner (e.g. by simply writing "Great job! Good point!" etc., throughout the margins). It is also to pinpoint ways to make the data more clear or the author's interpretations more reasonable and compelling. You must be supportive and challenging simultaneously!

Strive to do the following as much as possible:

1. *Suggest and request more detail and description.* Try suggesting that the author needs to give more detail or description, especially in field notes or with background information for an interview. While I know that it is neither possible nor appropriate to record "everything" seen and heard, all of us need to push ourselves to use as much detail and description as possible. Do not forget to include information about body language, social or emotional atmosphere of the interview or observation, and so on, as they change and evolve during an observation or interview.
2. *Suggest additional observation or interview strategies.* For example, suggest additional or different people to interview, times to observe, or questions to ask. Sometimes these ideas will be useful and/or practical, and sometimes not—if in doubt, as editor, make the suggestion anyway. The author will know the setting and people better than you will, so expect the author to make up his/her own mind about whether to use any particular suggestion. But at least make your suggestions available for consideration.
3. *Offer additional interpretive comments, relevant topics, or themes.* Authors will be making their own interpretive comments, but add to your own editorial comments from time to time. What the editor notes and/or proposes as concepts, themes, and issues may or may not prove important in the long run. Sometimes the editor may ask a question ("What does this suggest?"), sometimes the editor may indicate alternative interpretations for an observation ("This sounds like..."), or sometimes the editor may simply underline something in the field notes or make a notation in the margin to direct attention to a potentially important theme.