

Generating grounded theory of/for educational practice: the journey of three epistemorphs

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This article portrays the conceptual journey of three professionals as they grapple with the epistemological, ontological and axiological underpinnings of grounded theory within the context of practice-based research. Writing from the stance of ‘epistemorph,’ the authors use the concepts of ‘functionalist drift’ and ‘interpretive drift’ to depict the intellectual crosscurrents set in motion by their taken-for-granted assumptions about the nature of knowledge. An evolving set of questions reflects shifts in thinking that occur as these assumptions are surfaced and examined. From the ‘ground’ of this journey, the authors come to an interpretive reframing of key ‘logics’ of the grounded theory method including theoretical sensitivity, theoretical sampling, coding, constant comparative analysis and memoing.

Introduction

This article recounts the authors’ quest to understand grounded theory as a genre for dissertation research in a ‘practitioner field.’ The metaphors of a ‘journey’ and ‘morphing’ are used to convey the evolving conceptual nature of this quest. Our journey began with a seemingly straightforward question: ‘How does one *do* a grounded theory dissertation?’ As we delved into the literature, however, the answer to this question became more and more elusive. In trying to make sense of the often contentious discourses surrounding grounded theory, we began to recognize within ourselves the tug of different forces.

On one side were forces drawing us toward our scientific roots. Indeed, the initial appeal of grounded theory lay in its apparently systematic, ‘scientific’ procedures for generating knowledge from qualitative data. On the other side was a force generated by our growing awareness that meanings embedded in our practices could better be

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understood through an interpretive mode of inquiry (Soltis, 1984; Schwandt, 1994, 1999; Heshusius & Ballard, 1996; Piantanida & Garman, 1999; Sipe & Constable, 1996). To avoid inadvertent and counterproductive ‘drift’ between these epistemological crosscurrents, we began to grapple with issues that generated considerable anxiety, what Schwandt (1996) alludes to as ‘epistemological discomfort’ (p. 80).

The necessity of making decisions about the procedures of our studies found us resonating with Guba and Lincoln’s (1998) contention that ‘novices must first be resocialized from their early and usually intense exposure to the received view of science’ (p. 216). Cindy whimsically coined the term ‘epistemorph’ to describe the sense of internal transformation that she was experiencing. ‘Morphing’ quickly became our metaphor for the process of reshaping our assumptions about the ‘ologies’—i.e. what we take to be true (epistemology), what we take to be real (ontology), and what we take to be of value (axiology).¹

In one short article, it is impossible to recount all of the twists and turns that our journey has taken. Indeed, we still see ourselves as actively morphing, a process that Maria is still experiencing some 20 years after completing her grounded theory dissertation. It is our intent, therefore, to portray several key phases of our journey and examine issues that arose as we entered into grounded theory studies of our educational practice. These are:

- coming together as ‘epistemorphs’;
- starting the journey—the appeal of grounded theory as a research genre;
- continuing the journey—sorting through the discourses on grounded theory;
- abandoning the quest for a pristine method of grounded theory;
- moving from narrow focus on technique to a broader focus on ‘logic-of-justification’;
- crafting interpretive logics for grounded theory dissertation research in education.

Coming together as Epistemorphs

Although we came to an interest in qualitative research from different pathways, our mutual exploration of grounded theory began during an introductory course on qualitative research that Maria was co-teaching. Although Cindy and Robin both had extensive training in more quantitative research approaches, each was drawn to the course by an intuitive sense that their dissertations might include qualitative data and might benefit from a more interpretive approach to the research. Cindy, an experienced educational evaluator, had grown increasingly intrigued by the discursive (Garman, 1994) and deliberative (Donmoyer, 1995) nature of her work with a regional collaborative group focused on improving the quality of math and science education. She, like a number of other evaluators (e.g. Weiss, 1983, 1998; Mathison, 1994; Patton, 1994, 1997; Preskill & Torres, 1996, 1998), was looking for ways to tease out, describe and better understand the meanings and nuances in her relationships with collaborative participants.

Although Robin works in the world of medicine rather than education, her role as a genetic counselor fostered a growing sensitivity to human dilemmas that arise when

patients are confronted with the option of genetic testing. As was the case with Cindy, Robin's personal interests were reinforced by the needs of her profession where calls for qualitative research on patient experiences were increasing (e.g. Beeson, 1997). Since courses on qualitative research were not available in her own doctoral program, Robin came to the university's School of Education.

Preliminary explorations of various qualitative research approaches engendered in Cindy and Robin an interest in grounded theory, the research genre that Maria had used for her dissertation on the practice of hospital-wide education (Piantanida, 1982). As mentioned above, all three of us were initially drawn to grounded theory because of its procedures for dealing systematically and rigorously with qualitative data. Working as we did in fields that privilege scientific research, grounded theory offered the reassuring sense that our 'non-traditional' studies could be conducted in a rigorous manner.² In addition, as Stern (1980) suggests, 'the strongest case for the use of grounded theory is in investigations of relatively uncharted waters [Robin's situation], or to gain a fresh perspective in a familiar situation [Cindy's situation]' (p. 20).

Once Cindy and Robin decided to undertake grounded theory dissertations, our more casual conversations about this research genre intensified, and we coalesced into a 'mini-discourse community' with regularly scheduled meetings. Initially, our explorations were guided by a somewhat functionalist longing for detailed instructions on 'doing' grounded theory. Gradually, however, we came to see the futility of this search and recognized the need for a conceptual understanding of the 'logics' underpinning Cindy's and Robin's studies. At this point, the subtle morphing we had been experiencing became more explicit and pronounced. We came to see ourselves as 'epistemorphs'—individuals grappling with our orientation towards inquiry. Van Manen (1977) suggests that 'underlying every orientation is a definite epistemology, axiology and ontology, i.e., a person's orientation is composed of what he believes to be true, to be valuable, and to be real' (p. 211). The next three sections of this article recount what brought us to this turning point.

Starting the journey—the appeal of grounded theory

In the opening pages of *The discovery of grounded theory*, Glaser and Strauss (1967) lay out their core thesis—i.e. generating theory from the qualitative data of sociological fieldwork is an important (and at that time grossly under-valued) complement to theory verification. To support their thesis, they needed to make a persuasive argument for the legitimacy of knowledge grounded in the idiosyncrasies of lived experience. The twin processes of conceptual coding and constant comparative analysis became the centerpieces of Glaser and Strauss's portrayal of a more inductive, theory generating mode of inquiry. The persuasiveness of their argument is illustrated by a comment in the opening pages of *Grounded theory in practice*, a book published 30 years after *Discovery*:

Grounded theory methodology and methods (procedures) are now among the most influential and widely used modes of carrying out qualitative research when generating theory is the researcher's principal aim. This mode of qualitative study has spread from its original

use by sociologists to the other social sciences and to practitioner fields, including at least accounting, business management, education, nursing, public health, and social work. (Strauss & Corbin, 1997, p. vii)

We three, like so many others, have been drawn to grounded theory by the idea that it is possible to theorize from qualitative data grounded in the lived experiences of individuals. Yet, as novice researchers looking for guidance on how to actually *do* a grounded theory study, we found the original articulation of the method in *Discovery* to be somewhat nebulous. Judging from the number of books and articles that have been written on the method since 1967 (e.g. Antle May, 1996; Charmaz, 1994, 2000; Glaser, 1978, 1992, 1994, 1998; Stern, 1980; Strauss & Corbin, 1994, 1997, 1998), we suspect that we are not alone in turning to subsequent literature for clarification of the grounded theory method.

Sorting through the discourses on grounded theory

When Maria undertook her grounded theory research in 1980, little elaboration on Glaser and Strauss's description of the method was available. By 1998, however, as Cindy and Robin began conceptualizing their studies, a massive literature on grounded theory had evolved. Ironically, immersing themselves in this literature led not to clarification but to further cognitive dissonance. It took considerable time and many discussions to gain some perspective on the threads of discourse embedded in the literature.

A thread that emerged most readily consists of articles recounting specific grounded theory studies (e.g. Atwood, 1977; Wolanin, 1977; Combs, 1984; Hinds, 1984; Hutchinson, 1986; Phillips & Rempusheski, 1986; Morse & Johnson, 1991; Rempusheski, 1999). Typically, these articles are aimed at audiences that would be more interested in the substance of the theory than in the research procedures. While these offer often interesting examples of how a grounded theory might be portrayed, they often provide only minimal insight into the process by which the theory was generated.

A thread with more emphasis on the methodological aspects of grounded theory is introduced by those who are arguing for the legitimacy of qualitative research within a given field. Rempusheski (1999), for example, in making a case for qualitative research in the study of Alzheimer's disease, discusses grounded theory (along with ethnography) as a potentially useful method. Earlier, others (e.g. Simms, 1980; Stern, 1980; Stern *et al.*, 1984; Chenitz & Swanson, 1986; Swanson-Kauffman, 1986) had made a similar argument for the use of grounded theory in nursing. Often this thread of discourse focuses on epistemology and the legitimacy of qualitative research in general and grounded theory in particular. In some instances there is an effort to relate grounded theory to other methods of qualitative research (e.g. ethnography, phenomenology) or to extend and refine the original formulation of grounded theory. For example, Kools *et al.* (1996) argue that Schaztman's concept of dimensional analysis is an alternative to constant comparative analysis, yet still compatible with grounded theory.

The third and most ubiquitous thread in the discourse consists of efforts to clarify what Glaser and Strauss ‘really’ meant in *Discovery*. Glaser (1978, 1992, 1994, 1998) and Strauss in collaboration with Corbin (1994, 1997, 1998) have contributed significantly to this discourse. Interestingly, as each worked to clarify his conception of grounded theory, an apparent schism opened between the two. Charmaz (2000) offers a thoughtful analysis of the constructs that characterize this schism and has summarized a number of studies that attempt to clarify specific procedures, espousing either a more ‘Glaserian’ or ‘Straussian’ approach to grounded theory. Regardless of which approach one champions, there is a recurring concern within this thread of discourse regarding the quality of some studies put forward as grounded theory research. Stern (1994), for example, expresses concern about the ‘erosion of grounded theory’ and suggests that if one uses more ‘correct’ procedures one can generate more useful and viable theory.

Abandoning the quest for a pristine method of grounded theory

Unfortunately, efforts to clarify procedural ambiguities in grounded theory have imbued the discourse with a rather divisive tone as some authors argue that their particular take on the method is more correct than others. A potentially dangerous side effect of these arguments is an impression that one must find and follow the one ‘pristine’ method of grounded theory. Robin, for example, submitted a grant proposal to seek funding for her dissertation research. Although the proposal received good reviews for the appropriateness of the topic, the quality of the writing and the suitability of the research method, one reviewer who described herself as an experienced grounded theorist criticized the procedures as not being *true* grounded theory and suggested that the proposed approach could be misleading.

Pronouncements for procedural orthodoxy are particularly perplexing given the frequency and consistency with which Glaser and Strauss and Corbin reiterate the importance of methodological flexibility. Writing in 1967, Glaser and Strauss state:

Our principal aim is to stimulate other theorists to codify and publish their *own* methods for generating theory.... In our own attempt to discuss methods and processes for discovering grounded theory, we shall, for the most part, keep the discussion open-minded, to stimulate rather than freeze thinking about the topic. (pp. 8–9)

Three decades later, despite any disagreements they might have with Glaser, Strauss and Corbin (1998) reaffirm this principle of flexibility:

This is *not* a recipe book to be applied to research in a step-by-step fashion. Our intent is to provide a set of useful tools for analyzing qualitative data. We hope that through our examples, readers will come to realize the fluid and flexible approach to data analysis provided by this method. (p. xi)

Our version of qualitative analysis offers a cluster of very useful procedures—essentially guidelines, suggested techniques, but *not* commandments. We also offer a *methodology*, a way of thinking about and studying social reality. (p. 4)

Similarly, Glaser (1999) suggests that the method is continually evolving and must remain flexible to accommodate more current research interests.

Although such calls for flexibility should be reassuring, we were still haunted by the possibility that there might be some point at which deviations in method would take us beyond the limits of grounded theory. Maria, in particular, was concerned about being what Stern (1994) calls a ‘minus mentor,’ offering Cindy and Robin misleading advice based on an outdated understanding of the method. Charmaz (2000) offers the following description of the essence of grounded theory:

The rigor of grounded theory approaches offers qualitative researchers a set of clear guidelines from which to build explanatory frameworks that specify relationships among concepts. Grounded theory methods do not detail data collection techniques; they move each step of the analytic process toward the development, refinement, and interrelation of concepts. The *strategies* [emphasis added] of grounded theory include (a) simultaneous collection and analysis of data, (b) a two-step data coding process, (c) comparative methods, (d) memo writing aimed at the construction of conceptual analyses, (e) sampling to refine the researcher’s emerging theoretical ideas, and (f) integration of the theoretical framework. (pp. 510–511)

These are fairly broad parameters and argue against a singular, pristine model of ‘true’ grounded theory. Yet, in some ways, the latitude granted by this position brought us back to the dilemma engendered by the nebulousness of the original formulation of grounded theory. However, having struggled to make sense of the differing perspectives in the grounded theory discourses, we viewed the ambiguities of grounded theory from a new vantage point.

Moving from a narrow focus on technique to a broader focus on logic-of-justification

Robin and Cindy began their dissertation journeys asking ‘How do I *do* grounded theory?’ Immersion in the literature shifted their focus to ‘How do I *choose* the “right” grounded theory method?’ The dysfunctionality of both questions became apparent with the realization that there is a fifth thread in the discourses.

Some authors (e.g. Rennie, 1998a, 1998b; Charmaz, 1994, 2000; Annells, 1996; Miller & Fredericks, 1999) are writing not to clarify the processes of conceptual coding or constant comparative analysis, but rather to lay out a logic-of-justification for the theorizing process. Annells (1996) put this thread of the discourse into perspective with her comment, ‘grounded theory method has traditionally been sited in a post-positivist inquiry paradigm but is evolving and moving toward the constructivist inquiry paradigm.’ She further suggests:

The researcher is encouraged to consider philosophical and paradigmatic aspects ... prior to selecting grounded theory method for a research project. However, it is vital to recognize the method is subject to evolutionary change with differing modes resultant and is therefore not static in regard to philosophical perspective, fit with a paradigm of inquiry, and research process. (p. 391)³

Similarly, Charmaz (2000) indicates that the original formation of grounded theory and subsequent critiques by both Glaser and the team of Strauss and Corbin continue to be informed by a ‘realist ontology and positivist epistemology’ that seems

‘untouched by the epistemological debates of the 1960s ... or postmodern critiques’ (p. 513). She further encourages researchers to examine underlying ontological and epistemological perspectives, asserting that ‘grounded theory methods evolve in different ways depending on the perspectives and proclivities of their adherents’ and that by exploring those underpinnings ‘we can acknowledge the limits of our studies and how we shape them’ (p. 528).

Reading this was liberating, freeing us from futile efforts to reconcile diverse perspectives on grounded theory, to strive for methodological purity or to choose the ‘right’ version of the method. As Schwandt (1994) cautions, preoccupation with methods (techniques for data collection) ‘often masks a full understanding of the relationship between method and inquiry process’ (p. 119). Smith and Heshusius (1986) contend that when method is viewed not as technique but as ‘logic of justification,’ the focus is ‘on the elaboration of logical issues and, ultimately, on the justifications that inform practice’⁴ (p. 8). By approaching method as logic-of-justification, the grounded theory researcher makes explicit the connections among research paradigm, strategies and techniques. Once again, the question guiding our own explorations shifted to ‘What is our logic-of-justification for grounded theory within the context of our particular studies?’

Moving toward an interpretive logic-of-justification

Annells’s (1996) contention that grounded theory is not statically fixed within a particular paradigm sheds light on our own (and we speculate others’) struggle to cope with the nebulousness inherent in the original articulation of grounded theory. Glaser and Strauss (1967) were aware of the ambiguities in *Discovery* and, to a certain extent, seemed comfortable with them:

Because this is only a beginning, we shall often state positions, counter-positions and examples, rather than offering clear-cut procedures and definitions, because at many points we believe our slight knowledge makes any formulation premature. (p. 1)

Yet, we can imagine others asking, as we did, ‘Yes, but how do you really do this thing you call grounded theory? Just what do you mean by coding? How does this constant comparative analysis process get you to a theory? What does a grounded theory look like? How do you know when you’ve arrived at a theory? What’s the difference between a good grounded theory and a flimsy one? How can the legitimacy of a grounded theory be demonstrated? How can we respond to claims that grounded theory is just making something up? How can we be certain that our theory really explains the phenomenon under study?’ We can also imagine that first Glaser and Strauss and then others experienced tremendous pressure to respond to such demands for clarification. The tug of epistemological forces that we experienced within ourselves may help to account for the crosscurrents at play in the broader discourses about grounded theory. For, in the face of methodological ambiguity, conditions are ripe for inadvertent functionalist or interpretivist ‘drift.’⁵

We characterize ‘functionalist drift’ as the pull toward specific, ‘how-to’ techniques that mimic the precision of post-positivist scientific methods. Caught unaware in this drift, one runs the risk of reductionist thinking—an infinite regression toward ever finer (but not more useful) specificity of technique. In contrast, we characterize ‘interpretive drift’ as a deliberative stance leading not to method but to *the identification of issues about method*. Deciding how one wants to resolve these issues within the context of a particular study constitutes the logic-of-justification (and hence, the method) of that inquiry. Caught unaware in this interpretive drift, one runs two potential risks. One is an ‘anything goes’ abandon in which hallmarks of the original method are completely lost in the allure of infinite freedom. The other is a solipsistic adherence to a premature interpretation.

Recognizing a growing desire to situate ourselves more firmly within an interpretive inquiry tradition, we revisited the writings of Glaser and Strauss to see if such a position could be warranted. Although they do not place grounded theory within an interpretive tradition (a claim that would be highly unlikely given their grounding in a social *science* and the era in which they were writing), they repeatedly stress the role of researchers in making meaning of their data. Glaser (1978) in *Theoretical sensitivity* seems especially intent on helping readers ‘to get a feel’ for how one thoughtfully interacts with data and places considerable emphasis on the process of memoing to support this creative interaction:

The *core stage* in the process of generating theory, the bedrock of theory generation, and its true product is the writing of theoretical memos. If the analyst skips this stage by going directly from coding to sorting or to writing—he is *not* doing grounded theory. *Memos are the theorizing write-up of ideas about codes and their relationships as they strike the analyst while coding....* Memo-writing continually captures the ‘frontier of the analyst’s thinking’ as he [*sic*] goes through his data, codes, sorts or writes. (p. 83)

Strauss and Corbin (1998) also assert the centrality of the researcher’s thinking process. After laying out six characteristics of a grounded theorist, they go on to say:

These characteristics, however, never will develop if researchers focus solely on the procedures presented in this text and apply them in a *rote* manner. We want readers to understand what we say, to understand why they are using certain activities, and to do so flexibly and creatively. We want them to acquire a way of thinking about data and the world in which they live. We want them to question, to be able to easily move from what they see and hear and to raise that to the level of the abstract, and then to turn around again and move back to the data level. We want them to learn to think comparatively and in terms of properties and dimensions so that they can easily see what is the same and what is different. The importance of this methodology is that it provides a sense of *vision, where it is that the analyst wants to go with the research*. (p. 8)

These (and similar statements too numerous to cite) place the researcher’s capacity to make meaning of data at the heart of the theorizing process. This aspect of grounded theory makes the genre suitable for and compatible with the growing focus on interpretive inquiry within educational research. With this reassuring perspective in mind, the question guiding our explorations underwent

another transformation. We began to consider, ‘What does it mean to generate a substantive grounded theory within practitioner fields of education and genetic counseling?’

Claiming grounded theory for practice-based dissertation research

In *The discovery of grounded theory*, Glaser and Strauss (1967) asserted, ‘One property of an applied grounded theory must be clearly understood: The theory can be developed only by professionally trained sociologists...’ (p. 249). Within a few years, however, Glaser had (1978) amended this position, stating:

We have advised, guided and consulted on dissertations in political science, social welfare, education, health education, educational sociology, public health, psychology, business administration, nursing, city and regional planning, and anthropology. Although there is some interweaving, *most of these students have submitted essentially social science dissertations* [emphasis added] and written papers speaking to the issues in their own field. (p. 158)

Two decades later, Strauss and Corbin (1998) echo this ecumenical view, stating:

As a methodology and a set of methods, our approach to research is used by persons in practitioner fields such as education, nursing, business, and social work, as well as by psychologists, architects, communications specialists, and social anthropologists. (p. 9)

The adaptability of grounded theory to a variety of fields has made it enormously popular, yet may also have obscured an important point, hinted at by the point we emphasized above in the quotation from Glaser. Charmaz (1994) brings our concern more clearly into focus:

Grounded theorists code for processes that are fundamental in ongoing social life. These processes may be at organizational or social psychological levels, depending on the researcher’s training and interests. (p. 98)

We contend that it is important to consider the difference between doing social science research and dissertation research in a ‘practitioner field’ like education or counseling. Some may argue that we are drawing unnecessarily sharp distinctions between the two. However, not trained as sociologists, we are neither prepared nor inclined to look for fundamental processes of social life at an organizational or social psychological level. It would, we believe, be presumptuous to cast ourselves as ‘social scientists’ and imagine ourselves contributing in some meaningful way to the discourses of sociology. Rather, we claim the stance of practitioners intent on generating substantive grounded theories that come out of the ground of our respective practices and are useful for enacting those practices.

Schon (1983), in his now landmark book, *The reflective practitioner, how professionals think in action*, contrasts a rational-technical view of practice with a reflective view. He argues that practitioners rarely encounter neatly framed problems to which they can apply predetermined solutions. Rather, practitioners more typically operate in the swampy lowlands of messy ambiguity, formulating courses of action as they engage in on-the-spot reflection. Garman (1994), in discussing the nature of supervisory

practice in education, challenges the individualistic nature of Schon's notion of reflection and argues for a practice grounded in discourse.

From this perspective, practice is relational and enacted through discursive exchanges among participants within a shared context. Extending van Manen's (1991) notion of the 'pedagogical moment' to the idea of discursive practice, we use the concept of 'discursive moments' to describe exchanges of heightened meaning when we, as practitioners, are called upon to respond to others within the complexities of a given context. The question then becomes, 'What informs our responses within the heat of a "discursive moment"?'

In discussing the dilemma of linking educational theory to teacher practice, Korthagen and Kessels (1999) use the concept of 'gestalts' to describe 'the dynamic and holistic unity of needs, feelings, values, meanings and behavioral inclinations triggered by an immediate situation' (p. 9). These gestalts, forged through a lifetime of experiences and relationships, constitute a constellation of 'tacit knowledge' (Polanyi, 1967) through which we filter information, make meaning of a situation and formulate our response. Korthagen and Kessels suggest that this process of perception, interpretation and response occurs instantaneously and unconsciously. They further suggest that reflection is one way of slowing down the process so that teachers can begin to understand the implications of their gestalts within their practice.

Because we see practice as relational and discursive, a key issue in understanding our own gestalts is understanding the stance we take toward others. In an article entitled 'On understanding understanding,' Schwandt (1999) offers an explanation of the relational nature of understanding. Drawing on the work of Gadamer, Schwandt contrasts three different stances for interpreting 'self in relation to other.' In the first stance, which Schwandt associates with the social sciences, 'we treat the Other as an object in a free and uninvolved way, much as we would any other object in our experiential field.' This stance assumes that, through research, it is possible to 'discover the typical behavior of the Other and to make predictions about others on the basis of experience. We thereby form what we call knowledge of human nature' (p. 458). In the second stance, Other is not treated as an object, but still 'the interpreter claims to know the Other from the Other's point of view, and even to understand the Other better than she understands herself' (p. 458). In each of these interpretations of self and other, the practitioner operates from a stance that Tananis (2000) characterizes as 'insulated expert.' The insulated expert stands apart from the situation and presumes her interpretation of it is 'correct' and her response to it is the most cogent. How others might view the situation is of secondary importance to the privileged, theoretical 'knowledge of human nature' claimed by the insulated expert.

It is Schwandt's description of a third relational stance, however, that is most germane to our notion of discursive practice. He explains:

... understanding requires an openness to experience, a willingness to engage in a dialogue with that which *challenges our self-understanding* [emphasis added]. To be in a dialogue requires that we listen to the Other and simultaneously risk confusion and uncertainty both about ourselves and about the other person we seek to understand. (p. 458)

Thus, in claiming grounded theory as a mode of inquiry within our ‘practitioner fields,’ we do not embrace an objectivist axiology, ontology or epistemology in which we strive to identify ‘typical behaviors’ and warrant those behaviors as generalized ‘knowledge of human nature.’ Rather, working within an interpretive axiology, ontology and epistemology, we probe contextual nuances as interpreted by ourselves in concert with others. Our purpose in the inquiry is not to prove that our interpretations are right or true, and thereby provide the basis for prescriptive interventions. Rather, through discursive exchanges within the inquiry process we come to challenge our own self-understandings by bringing our tacit knowledge to light, recognizing our taken-for-granted assumptions and examining our preconceptions (and perhaps misconceptions). In the process, we strive to understand and portray the range of meanings that we and others might bring to our discursive exchanges, thereby expanding our capacity to respond wisely within ‘discursive moments’ of practice.

If such knowledge remains idiosyncratic and individual, it might be interesting and personally useful, but hardly theoretic. To move toward the theoretic, it is necessary, but not sufficient, to respect the idiosyncratic situation. It is also necessary, but not sufficient, to honor the individual meanings we and others make of such situations. To theorize, however, we must be able to bring a conceptual perspective to the situational and the individual experience. And therein lies the power of grounded theory. Concepts, as Glaser and Strauss (1967) remind us, are the building blocks of theory. The procedures of grounded theory provide interpretive researchers with a disciplined process, not simply for generating concepts, but more importantly for coming to see possible and plausible relationships among them. It is the researcher’s portrayal of these conceptual relationships that constitute a grounded theory. Within an interpretive epistemology, such grounded theories are understood to be heuristic,⁶ not predictive, in nature.

Because the interpretive researcher makes no claim for direct correspondence between the proposed theory and the ground that gave rise to it, the theory is warranted neither by procedural orthodoxy nor by precise execution of technique (e.g. strict adherence to ‘rules’ for coding and analyzing data). Rather, the grounded theory is warranted by the persuasiveness with which the researcher lays out her/his lines of reasoning about the concepts and the relationships among them. This brings us back to Smith and Heshusius’s (1986) distinction between method as technique/strategy and method as logic-of-justification. Warranting an interpretive grounded theory entails making explicit the logics the researcher followed in carrying out the inquiry process. Inevitably, logics must be custom-crafted to fit the intent and procedures of each grounded theory study. In our own morphing journey, therefore, we eventually came to realize that it was important to ask, ‘What does it mean to think about various aspects of grounded theory from an interpretive perspective? What interpretive logics would guide our inquiries?’ In the remainder of this article, we discuss our view of interpretive logics for several key aspects of grounded theory.

Interpretive logics for grounded theory

Theoretical sensitivity

Underpinning an interpretive approach to grounded theory is an ontological assumption that knowledge is a human construct, generated discursively within social contexts. Within this perspective, the researcher is obliged to strive not for objectivity, but for an awareness of her/his own positionality in relation to the inquiry. We see this as an interpretive logic for Glaser and Strauss's notion of theoretical sensitivity/wisdom.

Early in our journey, we feared that our knowledge of the context of our studies (i.e. educational evaluation, genetic counseling, hospital education) would 'contaminate' the inquiry process. Our initial impulse was to eliminate as many of our biases as possible, as though it might be possible to regain some virgin state of mind. Sensing the ontological implausibility of this approach, the alternative seemed to be to 'account for our subjectivity' and thereby somehow manage it or get it under control. Heshusius (1994) argues that such a response still implies a scientific ontological and epistemological stance—i.e. somehow we as researchers can be and should be distanced from what and who it is we hope to know. In contrast, she puts forward the idea of participatory consciousness in which 'the essence and starting point of the act of coming to know is not a subjectivity that one can explicitly account for, but is of a direct participatory nature one cannot account for.' Heshusius goes on to suggest that a participatory mode of consciousness 'results from the ability to temporarily let go of all preoccupation with self and move into a state of complete attention' (p. 17). This, it seems to us, provides an interpretive logic that views theoretical sensitivity/wisdom not as a methodological technique or strategy, but rather as a way of *being* in the inquiry, a state of mind that strives to be as fully and completely attentive as possible to the phenomenon one wants to understand.

Theoretical sampling

If one sees theoretical sensitivity/wisdom as a stance of participatory consciousness, then an interpretive logic for theoretical sampling is one's authentic commitment to attend as fully and completely as possible to the phenomenon one is striving to understand. Twenty years ago, when Maria was still in the early stages of morphing, she used the logic of triangulation to warrant the credibility of her substantive theory. Looking back, we can see this as a scientific logic—a quest to increase the confidence with which one can claim a correspondence between the theory and the ground from which it emerged. Today, as a result of our epistemological journey, we find it more useful to think about sampling as a conscientious and exhaustive quest for 'texts' rich with potential meanings about the phenomenon under study.

Using the notion of 'text' rather than 'data' may be one of our more significant departures from the original language of grounded theory. A focus on 'data' and 'data sources' is consistent with the social science research tradition within which Glaser and Strauss were schooled. 'Text' is embedded in the interpretive traditions of the

arts and humanities.⁷ The distinction between the two concepts may seem to be ‘merely semantics’ when considered in relation to theoretical sampling, but takes on heightened significance during the processes of coding and constant comparative analysis. We return to this point in the next section.

For now, we want to emphasize the idea of theoretical sampling as a quest for ‘texts’ relevant to the phenomenon under study. Alternately sampling divergent and convergent sources of texts is not intended to ‘prove’ that a particular phenomenon really exists, or to warrant a generalization, or to verify the validity or reliability of our interpretations. Rather, sampling divergent sources of texts helps us to challenge our preconceptions and broaden our appreciation for the complexities and nuances of the phenomenon. Sampling convergent sources helps us to hone in on a potential point or insight, to probe it more deeply, to get hold of something that we sense is important, but cannot quite grasp or put into words. Thus, in an interpretive approach to grounded theory, theoretical sampling helps to safeguard against premature or uninformed interpretation.

The theoretical approach to sampling obviates a neatly circumscribed process for ‘data collection,’ giving rise to the troubling question, ‘How will we know when our quest for relevant texts is over?’ The answer to this question lies in the grounded theory concept of ‘theoretical saturation,’ a condition that is achieved when ‘no additional data are being found whereby the sociologist can develop properties of the category’ (Glaser & Strauss, 1967, p. 61). ‘Great,’ said Robin, ‘but what does *that* mean? How many interviews should I tell my committee I’ll be doing?’

‘Well, here’s a suggestion that was given to me,’ Maria offered. ‘Keep interviewing until you’re not hearing anything new and then interview one more person to be on the safe side. It’s called the $n + 1$ rule of thumb.’

‘That’s all well and good for you,’ Cindy countered. ‘What do I do since I’m using a two-year record of e-mails as my primary text?’

Cindy’s dilemma alerted us to another form of functionalist drift—a preoccupation with saturation based on ‘sample size,’ rather than the conceptual power and coherence of the theory being generated. As Glaser and Strauss (1967) comment, ‘The criteria for determining saturation ... are a combination of the empirical limits of the data, *the integration and density of the theory* [emphasis added], and the analyst’s theoretical sensitivity’ (p. 62). Saturation, then, is achieved not merely through the conscientious acquisition of texts related to the phenomenon under study, but through the quality of the researcher’s interpretations of these texts. The interconnected processes of coding, constant comparative analysis and memoing constitute the grounded theorist’s modality for making increasingly insightful interpretations.

Coding, constant comparative analysis, and researcher memoing

When theoretical sampling is undertaken in a conscientious and vigorous way, a mass of texts quickly accumulates and gives rise to the question, ‘How can we make sense of all this stuff?’ As mentioned in the opening sections of this article, we were initially drawn to grounded theory because it seemed to offer fairly clear-cut techniques/

strategies for dealing with qualitative data. Naively, we had assumed that only the nature of one's data distinguishes 'qualitative' from 'quantitative' research. Grounded theory's twin processes of coding and constant comparative analysis appeared to be the qualitative analogue to statistical procedures for reducing, analyzing and interpreting data. In short, analytic coding would allow us to reduce the volume of stuff to a more manageable set of codes. Comparing the codes would allow us to identify key concepts that we could offer as an interpretation of the phenomenon under study.

By approaching coding and constant comparative analysis with this tacitly data-management mindset, we soon found ourselves caught in two forms of functionalist drift. One was a tendency to look for frequencies and convergent patterns among the codes in order to establish some generalization that would hold up across contexts and 'populations'⁸. However, because the codes come from texts that were identified through the logic of theoretical rather than statistical sampling these frequencies and patterns yielded little insight into the complexities of the phenomenon under study. Recognizing the limitations of this approach led to a second form of drift in which we began to compare one textual source with another (e.g. making comparisons among interviewees or between interviewees and organizational documents). Making such comparisons can be helpful, especially in suggesting avenues for further theoretical sampling and generating questions for probing the texts. Rarely, however, do they yield insights with theoretic power, because they remain mired in the situational. Comparing textual sources loses sight of the point that the codes, not the original sources, are the building blocks of theory. Thus, we came to see it is the codes we needed to explore and compare, not the people or textual artifacts from which the codes were derived.

Catching ourselves in functionalist drift allowed us to grapple with an alternative, interpretive logic for coding and constant comparative analysis. First, we needed to remind ourselves that our aim in the research is to deepen our understanding of the contextual and relational complexities of our discursive practice. We make the assumption that the texts accumulated through theoretical sampling hold traces of these complexities. We also assume that not every aspect of every text will be equally ripe with meaning. Given this, we find it useful to approach the coding process by first reading and rereading the texts from a stance of participatory consciousness; letting go of preoccupation with self; and resonating with potentially significant *discursive exchanges* within the texts.

We highlight the notion of discursive exchanges, because this gave us a way of thinking about what we are trying to code. Qualitative content analysis that aims for scientific truth claims often requires the uniform coding of preset 'units of analysis' (e.g. every sentence). This approach is not very useful in qualitative content analysis that aims for interpretive truth claims. For example, when we reviewed the transcript of Robin's first interview with a couple who had experienced genetic counseling and testing, we were struck by the way in which the richness of the interview increased through a cumulative layering of discursive exchanges. What the couple revealed at each stage of the interview seemed to flow from both their growing comfort and trust

with Robin as an interviewer, and Robin's capacity to raise questions based on her increased understanding of the couple's situation. To code the explicit content of each sentence would fragment the text and lose the more holistic sense of meaning that evolved through the discursive exchanges.

Pondering this dilemma helped us to move from a reductionist logic of analytic coding and toward a more integrative logic of interpretive coding. In the initial coding of a text, we generated substantive codes that we liken to Piantanida and Garman's (1999) notion of *iterative interpretation*, which 'tends to summarize, to repeat the essentials of a text' (p. 253). The aim is to draw on language found in the text to flag ideas or meanings that we explicitly or instinctively sense are important. Often these substantive codes are fairly low-level concepts that capture idiosyncratic, situational details.

Concomitant with coding is the process of comparing the codes with one another. In some ways, the descriptor of 'constant comparative *analysis*' is unfortunate because it harkens back to a more functionalist notion of analysis as separate and distinct from interpretation. We believe that Glaser's and Strauss and Corbin's emphasis on researcher memoing is their way of continuously integrating interpretation into the constant comparative process.

It is through a recursive process of comparing codes and memoing that we begin to move from *iterative* to *conceptual* interpretation. We have found it helpful to think in terms of a minimum of three tiers of codes. The first tier consists of the substantive codes still closely tied to the idiosyncrasies of the situation. By comparing substantive codes, we begin to cluster them based on what seem to be related characteristics or ideas. A second tier of concepts is more abstract, providing language to describe what we sense is meaningful about the various clusters of substantive codes. This level of coding begins to point to the nuances and complexities (e.g. issues, concerns, dilemmas and problematics) related to the phenomenon under study. The third tier is even more abstract, providing conceptual language to describe and explain the relationships among codes. We have come to see this move toward the third conceptual tier as the level at which more substantive theorizing occurs, although the grounded theory is being actively developed throughout the inquiry process. Maria uses the following analogy to describe how she finally came to understand the movement from the details of the substantive codes to the meaning embedded within them:

After coding interviews with 12 directors of hospital-wide education, I had a three-ring binder full of codes. I kept shifting and sorting them, trying to find what Glaser and Strauss call the core concept. Everything I wrote seemed terribly superficial and trivial. One evening, a colleague who was also working on a qualitative dissertation brought a big box full of stuff to a meeting, plopped it on the floor, and lamented, 'I don't know what to do with any of this.' Suddenly, I had an image of walking along the beach and gathering intriguing pebbles. I realized that my codes were like the pebbles, and I had been obsessed with sorting them into piles based on qualities such as color, shape, size, beach of origin, etc. Of course, my descriptions of the piles were tedious and banal. There was no meaning in the piles per se. With this realization came another insight. I could use the pebbles to create a mosaic—a conceptual picture—that would convey to others what I had come to understand about hospital-wide education. (Piantanida, 1982)

The creation of a conceptual mosaic is the core of the theorizing process. That is the level at which the complexities and nuances of the phenomenon are put into some perspective—not just for ourselves but also for others.

Let us return for a moment to the process of research memoing. When we were caught in the worst of functionalist drift, we viewed memoing simply as a way of recording our thoughts as we coded texts and compared codes. This casts memoing as a record-keeping function akin to Guba and Lincoln's (1985) notion of maintaining an 'audit trail' to document movement from 'data' to theory. As we morphed toward an interpretive understanding of grounded theory, we realized that the act of writing memos was a way of coming to know (Richardson, 2000).

Memoing served as a driving force for a recursive spiraling between iterative and conceptual interpretation. While the act of coding allowed us to attend more fully and completely to the ways others made meaning of their lived experience, memoing allowed us to attend to our internal process of meaning-making. Memoing expanded our discursive process beyond individual texts, allowing us to integrate questions, speculations, insights and interpretations across texts, including formal bodies of literature that could inform our thinking. Writing memos helped us to think through relationships among codes and clusters of codes until we came to an 'aha' moment—a conceptual leap that allowed us to see at least the broad outlines of the mosaic. It is important to note that the memos do not 'add up' to the substantive theory. Nor are they any more likely to appear in the formal presentation of the theory than lists of codes and concepts. Making the leap to a substantive theory entails generating a twofold portrayal—the ground from which the theory has emerged and the conceptual interpretation that constitutes the theory.

Generating and portraying a 'grounded theory'

Perhaps the most difficult issue in our epistemological journey came when we had to grapple with the question, 'In what sense is a substantive theory grounded?' Maria confessed that for years, when asked to explain this research method, she gave a somewhat simplistic and circular description. 'Grounded theory is an inductive method for generating, rather than verifying, a theory, and the theory is grounded in the data.' This begged the questions, 'Where do the data come from and what confidence do we have that the theory is a reliable and valid explanation of the human experience/phenomenon under study?'

For a while, functionalist drift carried us into the literature of grounded theory where considerable attention has been given to technical procedures of data collection and analysis. At first, this felt familiar and somewhat reassuring, because scientific logic holds that procedural precision yields reliable and valid data that, in turn, warrant the generalizable truth claims of the research. Yet, we could not help wondering why, in spite of all the attention that has been given to technical aspects of grounded theory, criticisms of grounded theory studies have begun to appear in the literature (e.g. Stern 1994).

Pondering this from our vantage point of epistemorphs, we came to a speculation. When grounded theory is enacted with a scientific mindset, articles on the research often follow the conventional format of a 'science report' (i.e. introduction, rationale for and statement of the problem, research methods, display of findings, discussion of findings and conclusion). As we began to comprehend that generating a theory is in essence an interpretive act, we began to see that the science report format had two significant limitations. First, the idea of reporting *findings* seems to lead to a functionalist display of first- and second-tier codes and concepts (e.g. summary lists or charts, often of frequencies and distributions of codes or concepts). As we came to realize in our own work, such a display is atheoretical, and as such is minimally insightful. Second, because a scientific logic assumes that a study's reliability and validity lie in procedural precision, the experiential ground from which data were obtained is often provided as a brief, descriptive summary of participants' demographic characteristics. As we struggled to work at the third conceptual tier, to formulate theoretic interpretations of the phenomenon under study, it was our portrayal of the *ground*, not the adherence to technical procedures, that could warrant the theory we were generating.

These speculations brought us face to face with the essence of an interpretive approach to grounded theory. From this perspective, the act of generating a substantive theory is inevitably an act of meaning-making. Meanings do not lie dormant in our 'data' waiting to be discovered. We create meanings by interpreting—with participatory consciousness—the texts that we accumulate throughout our inquiry. In claiming the stance of interpretivists, we take on an obligation of *portraying the experiential ground of the substantive theory*. It is the verisimilitude with which the ground is portrayed that serves as the starting point for warranting a substantive grounded theory.

Verisimilitude, to borrow from Bruner (1986), means that the phenomenon and context under study have been rendered with sufficient detail that they are recognizable as 'truly conceivable experience.' If we have generated substantive codes with sensitivity and insight, then we have the 'pebbles' necessary to create a mosaic of the ground with sufficient verisimilitude that others can experience vicariously the relational and discursive nature of our practice as we conceive it. More abstract conceptual codes call attention to aspects of the ground that we see as important. At the most theoretic level, our conceptual interpretations serve to explain what we see as meaningful relationships among aspects of the ground. Because we claim the grounded theory to be a heuristic rendering of our interpretations, the scientific warrants of verifiability, reliability, validity and generalizability are not applicable criteria for evaluating the credibility of the theory. As Piantanida and Garman (1999) suggest, more relevant criteria would include rigor, ethics, integrity, *verité*, utility, vitality and aesthetics. In other words, does the portrayal of the inquiry provide evidence that the research was conducted in a rigorous and ethical manner and does the substantive theory have a coherent conceptual integrity; does it ring true; does it offer useful insights; does it have the vitality and aesthetic richness to be persuasive?

Conclusion

In this article we have portrayed our journey as epistemorphs, tracing the evolution of the questions we thought to ask about conducting grounded theory dissertation research. Having begun with functionalist concerns about the proper techniques for conducting grounded theory research, we ultimately came to understand the importance of grappling with issues of epistemology, ontology and axiology.

In writing this article, we debated the necessity of including our journey and our experience of morphing. It occurred to us that this narrative portrayal represents the ground out of which we were able to craft interpretive logics for our grounded theory dissertations. It is hoped that our portrayal of this ground will allow other newcomers to experience vicariously some of the struggle and come a bit more easily to a logic-of-justification for their own research.

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Notes

1. Interestingly, it is not just novices who undergo a resocialization process as they come to question a 'received view of science.' In a collection of essays edited by Heshusius and Ballard (1996), noted researchers and evaluators (including Guba) recount their 'morphing' experiences as they moved from positivism to interpretivism.
2. In time, we came to understand that our concerns about 'the privileging' of scientific research arose more from our own insecurities than from actual monolithic views of research within our respective fields. As we became more immersed in the discourses relevant to our studies, we found other scholars who shared our interest in interpretive modes of inquiry.

3. Duke and Beck (1999) make a similar point that dissertation authors, regardless of method, consider carefully the philosophical and paradigmatic aspects that underpin their research.
4. Strauss and Corbin (1998) in the *Basics of qualitative research* make a distinction between *methodology* as 'a way of thinking about and studying social reality' and *method* as 'a set of procedures and techniques for gathering and analyzing data' (p. 3). Their concept of methodology is akin to Smith and Heshusius's concept of method as logic of justification and our concept of research genre. Because 'methodology' literally means the study of method, we find it a less appropriate descriptor for ways of thinking about procedures in a particular study.
5. Glaser and Strauss's original formulation of grounded theory itself offers an excellent example of an interpretive representation of a phenomenon—i.e. a particular mode of theorizing. Having themselves engaged in this particular theorizing process, Glaser and Strauss faced the dilemma of explaining their process to others. First they named it, using what is, in essence, a core concept—grounded theory—to characterize their inductive mode of theorizing that they grounded in field-based, qualitative data. Next, they had to represent what is essentially an invisible process of thinking. Coding and constant comparative analysis are key concepts for portraying this internal process and elaborating on the core concept. Everything else (e.g. types and levels of coding, theoretical sampling, saturation, memoing, frameworks for analysis), it seems to us, is concepts, categories and properties that flesh out their *substantive theory of theorizing*. Viewed in this way, the essence of the theorizing process lies not in faithful adherence to specific techniques/procedures but in the quality of thinking the researcher brings to bear, a property of grounded theory that Glaser and Strauss characterize as theoretical sensitivity/wisdom. Given the debates in the literature of grounded theory, we wonder, at times, if Glaser and Strauss themselves might be caught in functionalist and interpretive drift.
6. Heuristics are conceptual devices (e.g. principles, guidelines, typologies, models, hypotheses) of complex phenomena. As such, heuristics serve to further discourse and inquiry by offering coherent portrayals of phenomena. Heuristics are not claimed as correspondingly verifiable accounts that correspond directly to an external, objective reality.
7. For a more extensive discussion of issues surrounding the concept of 'text' in interpretive research see Ricoeur (1991), Tierney and Lincoln (1997) and Bazerman and Paradis (1991).
8. Those who are inclined to rely on computer-based data analysis programs can be especially vulnerable to such drift. While such programs can be extremely helpful in managing, sorting and retrieving large amounts of data, they are not useful for generating interpretations. For more thorough discussions about the issues related to computer-based data analysis, see Coffey *et al.* (1996); Fielding and Lee (1991); Weitzman (2000); and Weitzman and Miles (1995).

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