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MICHAEL PATTON SYMPOSIUM: ARTICLE

Two Decades of Developments in Qualitative Inquiry

A Personal, Experiential Perspective

Michael Quinn Patton
Union Institute and University, USA

ABSTRACT

The publication of the third edition of *Qualitative Research and Evaluation Methods* offers the author an opportunity to reflect back over two decades of developments in qualitative inquiry. Major developments include: the end of the qualitative–quantitative debate; the flowering of diverse and competing approaches within qualitative inquiry; the increased importance of mixed methods; the elaboration of purposeful sampling approaches; increasing recognition of the creativity at the center of qualitative analysis; the emergence of ever more sophisticated software to facilitate qualitative analysis; and new ethical challenges in the face of the potential impacts of qualitative inquiry on both those studied and those engaged in the inquiry.

KEY WORDS:

evaluation

mixed methods

purposeful sampling

qualitative

research methods

theoretical perspectives

Writing a qualitative methods book was nowhere on my horizon in 1979 when Sage publisher Sara Miller McCune came calling. At the time I was directing an NIMH-supported Evaluation Methodology doctoral level training program at the University of Minnesota, where I had gone as a postdoctoral fellow after completing an organizational sociology doctorate at the University of Wisconsin. My dissertation was an evaluation of an innovative educational program, which is how I stumbled into evaluation in the first place. When Sage's publisher called, I had just published *Utilization-Focused Evaluation* (1978/1997), which included a chapter comparing quantitative/experimental methods with qualitative/naturalistic methods. Based on that chapter, Sage sent me a manuscript on qualitative methods to review. The book focused on field audits of programs and how to catch people lying during interviews. My negative review concluded with a recommendation against publication. That is when Sara Miller McCune asked me to write a qualitative text. I declined. She responded that she badly wanted to publish a qualitative evaluation book because she believed there was a market for such a book, but the only one she had in hand was the one I had reviewed negatively. If I did not write one, she said, she would be forced to publish the one I had reviewed with disdain. And that is how I came to write *Qualitative Evaluation Methods* in 1980.

The publication of the third edition of that book in 2002, now titled *Qualitative Research and Evaluation Methods*, offers an opportunity to reflect back over two decades of developments in qualitative inquiry, at least as I have experienced those developments. To set the stage for those reflections, it may be helpful for me to share what happens between revisions.

CHANGING EDITIONS, CHANGING ISSUES

Completing a major revision is, for me, similar to what many graduate students experience when they have completed their dissertation. They do not want to look at it again for a long, long time, if ever. So, when I have finished a revision, I put the book aside. After seven or eight years, as I start thinking about revision, and no longer remembering exactly what is and is not in the book, I take a look to see what it does and does not include, given recent developments in qualitative methods. Both times I have done this, for the 1990 2nd edition and the 2002 3rd edition, I have been surprised by how much the field has developed in a decade. What I would like to highlight here are those changes that stand out to me over the last two decades in general, and the last decade in particular.

Each edition has carried a different title reflecting changes in emphasis over time. The 1st edition (1980) was entitled *Qualitative Evaluation Methods* and focused on the variety of ways in which qualitative methods were being applied in the then-still-emergent profession of program evaluation. That first edition

appeared in the midst of the heated qualitative–quantitative debate about the relative value of different methods and alternative paradigms. I wrote that book as a methods book, pure and simple. That is, it included no review of various theoretical perspectives (e.g. phenomenology, constructivism, hermeneutics). My thinking went like this: books on survey research or statistics do not open with a discussion of philosophy of science (e.g. positivism) or paradigm debates, why should a qualitative methods text open with a rhetorical methodological justification?

Moreover, my approach was pragmatic and concrete. At the time I was working primarily on small-scale local program evaluations where we wanted to find out what participants and staff were experiencing and thinking, and how, if at all, they were changing. We identified relevant questions, conducted interviews and observations, and kept the analysis as straightforward as possible, focused on generating useful and understandable data for program improvement. It seemed to me that one could engage in straightforward qualitative inquiry of this kind without locating it within some major philosophical, ontological, or epistemological tradition. This is not to deny the importance and influence of such traditions, and doctoral students ought to understand how mindsets and perspectives affect inquiry, but grassroots practitioners have concrete questions and information needs that can be answered in straightforward ways through qualitative inquiry, and that is where I wanted to locate the original book. I had examined the qualitative literature available at that time and it struck me as heavy on philosophy and theory, and light on methods and procedures. I wanted to correct that imbalance, at least with regards to the practice of utilitarian, pragmatic evaluation.

A related issue was adapting the field methods that had been elaborated in anthropology and sociology to the shorter timelines and practical utilization purposes of program evaluation. Anthropological field methods focus on lengthy periods of participant observation, always over many months, often over several years. Evaluation timelines, in contrast, especially for formative evaluation, can be a matter of weeks. Qualitative methods needed to be adapted for program evaluation. That is what I set out to do in 1980.

The second edition was influenced by maturing of the paradigms debate and included much more attention to the ways in which different theoretical and philosophical perspectives influenced qualitative inquiry as well as the greater range of applications in evaluation as that profession had blossomed. By 1990, the book was being adopted as a text in graduate level courses and the major critique from academic users was its neglect of theory and philosophy, so I added a chapter on theoretical orientations for those users, but strived to maintain the overall pragmatic and utilitarian approach of the book.

This latest edition, *Qualitative Research and Evaluation Methods* (2002), reflects the degree to which developments in qualitative inquiry during the last

decade have been driven by a diversifying research agenda and scholarly dialogue, much of which has found its way into evaluation.

Between editions I collect books, articles, conference papers, and examples of qualitative inquiry. Between 1990 and 2000 I collected some six file drawers of materials. It was a period of unprecedented development for qualitative methods. For example, during this period the first comprehensive *Handbook of Qualitative Research* was published under the inspired editorship of Norman Denzin and Yvonna Lincoln (1994) followed in 2000 by an even more wide-ranging second edition (Denzin and Lincoln, 2000a). Simply comparing those two editions will provide you with insight into how qualitative inquiry has become more complex and diversified. In 1995 Denzin and Lincoln created the journal *Qualitative Inquiry* that chronicles cutting-edge directions of qualitative work. Over the last decade Sage's *Qualitative Research Method Series* grew to 45 volumes exploring a myriad of technical, methodological, and substantive issues. Also during this time Russ Bernard converted *Cultural Anthropology Methods* to the new journal *Field Methods* both reflecting and advancing the increasingly interdisciplinary nature of qualitative inquiry. Bernard also managed to publish a second edition of *Research Methods in Anthropology: Qualitative and Quantitative Approaches* (1995) and write a comprehensive text on *Social Research Methods: Qualitative and Quantitative Approaches* (2000).

These distinguished examples represent merely the tip of the proverbial iceberg. In doing the revision for the third edition I reviewed over a thousand new books and articles on qualitative methods, program evaluation, case studies, monographs, and related works published in the last decade. Qualitative articles are scattered through scores of journals covering the full range of disciplines and professions. Specialized qualitative journals have emerged in a number of professions, as is the case with this journal, as well as health, nursing, and organizational development. Other new journals are devoted to specific approaches like the *Grounded Theory Review*. Sophisticated new software programs have been developed to support qualitative analysis. Internet listservs have emerged to facilitate dialogue.

Clearly, qualitative methodology has developed mightily over the last two decades. In the remainder of this article I discuss a few of the developments that strike me as most important. Here, then, is one participant observer's short list of how the field has changed.

End of the Paradigms Debate

The classic qualitative–quantitative debate has been largely resolved with recognition that a variety of methodological approaches are needed and credible, that mixed methods can be especially valuable, and that the challenge is appropriately matching methods to questions rather than adhering to some narrow methodological orthodoxy. As Thomas Cook (one of evaluation's

luminaries – the Cook of Campbell and Cook, 1979, the bible of quasi-experimentation) pronounced in his keynote address to the 1995 International Evaluation Conference in Vancouver, 'qualitative researchers have won the qualitative–quantitative debate.'

Won in what sense?

Won acceptance.

The validity of experimental methods and quantitative measurement, appropriately used, was never in doubt. Now, qualitative methods have ascended to a level of parallel respectability. That ascendance was not without struggle and sometimes acrimonious debate and, to be sure, there are still backwaters where the debate lingers, but among serious methodologists and practitioners, the debate is, for all practical purposes, over. For example, the professional Program Evaluation Standards (Joint Committee on Standards for Educational Evaluation, 1994) emphasize methodological appropriateness rather than paradigm orthodoxy, explicitly support *both* qualitative and quantitative methods, and place inquiry in a context that takes into account varying evaluation purposes, stakeholders and uses – and, therefore, varying methods. This has made it possible to employ a variety of methods, including qualitative ones, and still do an evaluation judged of high quality, thus undermining the paradigms debate, which often went on in absolute terms – context-free. For a detailed review of why and how the debate ended, see Patton, 1997: 265–99.

Flourishing Debate Among Qualitative Methodologists

With less need to establish the value of qualitative inquiry by debating those of quantitative/experimental persuasion, qualitative inquirers have turned their attention to each other, noticing that they are engaging in different kinds of qualitative inquiry from competing perspectives. Qualitative methodologists have thus taken to debating each other. The upshot of all the developmental work in qualitative methods is that there exists now as much variation among qualitative researchers as there is between qualitatively and quantitatively oriented scholars and evaluators. A primary purpose of the new edition is to sort out the major perspectives in that debate, portray the diversity of qualitative approaches now available, and examine the influences of this diversity on applications, especially but not exclusively in program evaluation. I have attempted to capture and organize this qualitative diversity by identifying alternative criteria for evaluating qualitative studies.

Alternative Criteria for Evaluating Qualitative Studies

Judging quality requires criteria. Credibility flows from those judgments. Quality and credibility are connected in that judgments of quality constitute the foundation for perceptions of credibility. Diverse approaches to qualitative inquiry – phenomenology, ethnomethodology, ethnography, hermeneutics, symbolic interaction, heuristics, critical theory, realism, grounded theory and feminist

inquiry, to name but a few – remind us that *issues of quality and credibility intersect with audience and intended inquiry purposes*. Research directed to an audience of independent feminist scholars, for example, may be judged by somewhat different criteria from research addressed to an audience of government economic policy makers. Formative evaluation for program improvement involves a different purpose and therefore different criteria of quality compared to summative evaluation aimed at making fundamental continuation decisions about a program or policy. Thus, it is important to acknowledge at the outset that competing philosophical underpinnings and theoretical orientations will generate different criteria for judging quality and credibility.

In broad terms, I have identified five contrasting sets of criteria for judging the quality of qualitative inquiry from different perspectives and within different philosophical frameworks. Some of the criteria within these frameworks overlap, but even then subtle differences in nuances of meaning can be distinguished. The five contrasting sets of criteria flow from:

- Traditional scientific research criteria;
- Social construction and constructivist criteria;
- Artistic and evocative criteria;
- Critical change criteria; and
- Pragmatic utilitarianism.

Figure 1 lists the criteria that flow from each of these perspectives or frameworks. I have chosen the five broader sets of criteria to correspond roughly with major stages in the development of qualitative research (Denzin and Lincoln, 2000b), to capture the primary debates that differentiate qualitative approaches and, more specifically, to highlight what seem to me to differentiate *reactions* to qualitative inquiry. With what perspectives and by what criteria will our work be judged by those who encounter and engage it? By understanding the criteria that others bring to bear on our work, we can anticipate their reactions and help them position our intentions and criteria in relation to their expectations and criteria, a dialogue I find that I spend a great deal of time engaged in. The short sections that follow describe briefly each of the five alternative sets of criteria.

Traditional Scientific Research Criteria

One way to increase the credibility and legitimacy of qualitative inquiry among those who place priority on traditional scientific research criteria is to emphasize those criteria that have priority within that tradition. Science has traditionally emphasized objectivity, so qualitative inquiry within this tradition emphasizes procedures for minimizing investigator bias. Those working within this tradition will emphasize rigorous and systematic data collection procedures,

for example, cross-checking and cross-validating sources during fieldwork. In analysis it means, whenever possible, using multiple coders and calculating inter-coder consistency to establish the validity and reliability of pattern and theme analysis. Those working in this tradition are comfortable using the language of 'variables' and 'hypothesis testing,' and striving for causal explanations and generalizability, e.g. grounded theory (Glaser, 2000, 2001), qualitative comparative analysis (Ragin, 1987, 2000), and realists like Miles and Huberman (1994). Their common aim is to use qualitative methods to describe and explain phenomena as accurately and completely as possible so that their descriptions and explanations correspond as closely as possible to the way the world actually operates. Government agencies supporting qualitative research (e.g. the US General Accounting Office, National Science Foundation, or the National Institutes of Health) usually operate within this traditional scientific framework. In program evaluation this framework is represented by Rossi et al. (1999) and Chen and Rossi (1987).

Social Construction and Constructivist Criteria

Social construction, constructivist and 'interpretivist' perspectives have generated new language and concepts to distinguish quality in qualitative research. For example, Lincoln and Guba (1986) suggested 'credibility as an analog to internal validity, transferability as an analog to external validity, dependability as an analog to reliability, and confirmability as an analog to objectivity.' In combination they viewed these criteria as addressing 'trustworthiness, itself a parallel to the term *rigor*' (Lincoln and Guba, 1986: 76–7; emphasis in original). They went on to emphasize that naturalistic inquiry should be judged by dependability (a systematic process systematically followed) and authenticity (reflexive consciousness about one's own perspective, appreciation for the perspectives of others, and fairness in depicting constructions in the values that undergird them). They view the social world (as opposed to the physical world) as socially, politically and psychologically constructed, as are human understandings and explanations of the physical world. They triangulate to capture and report multiple perspectives rather than seek a singular truth. Constructivists embrace subjectivity as a pathway deeper into understanding the human dimensions of the world in general as well as whatever specific phenomena they are examining. They are more interested in deeply understanding specific cases within a particular context than in hypothesizing about generalizations. Indeed, they are suspicious of causal explanations and empirical generalizations applied to complex human interactions and cultural systems. They offer perspective and encourage dialogue among perspectives rather than aiming at singular truth and linear prediction. Social constructivists' findings are explicitly informed by attention to praxis and reflexivity, that is, understanding how one's own experiences and background affect what one understands and how one acts in the world,

Traditional Scientific Research Criteria

- Objectivity of the inquirer (attempt to minimize bias)
- Validity of the data
- Systematic rigor of fieldwork procedures
- Triangulation (consistency of findings across methods and data sources)
- Reliability of codings and pattern analyses
- Correspondence of findings to reality
- Generalizability (external validity)
- Strength of evidence supporting causal hypotheses
- Contributions to theory

Constructivist Criteria

- Subjectivity acknowledged (discuss and take into account biases)
- Trustworthiness
- Authenticity
- Triangulation (capturing and respecting multiple perspectives)
- Reflexivity
- Praxis
- Particularity (doing justice to the integrity of unique cases)
- Enhanced and deepened understanding (verstehen)
- Contributions to dialogue

Artistic and Evocative Criteria

- Opens the world to us in some way
- Creativity
- Aesthetic quality
- Interpretive vitality
- Flows from self; embedded in lived experience
- Stimulating
- Provocative
- Connects with and moves the audience
- Voice distinct, expressive
- *Feels* 'true' or 'authentic' or 'real'

Critical Change Criteria

- Critical perspective: Increases consciousness about injustices
- Identifies nature and sources of inequalities and injustices
- Represents the perspective of the less powerful
- Makes visible the ways in which those with more power exercise and benefit from power
- Engages those with less power respectfully and collaboratively
- Builds the capacity of those involved to take action
- Identifies potential change-making strategies
- Praxis
- Clear historical and values context
- Consequential validity

Pragmatic, Utilitarian Evaluation Standards

- Utility
- Feasibility
- Propriety
- Accuracy (balance)
- Systematic inquiry
- Evaluator competence
- Integrity/honesty
- Respect for people (fairness)
- Contributions to program improvements
- Responsibility to the general public welfare (taking into account diversity of interests and values)

Figure 1 ALTERNATIVE SETS OF CRITERIA FOR JUDGING THE QUALITY AND CREDIBILITY OF QUALITATIVE INQUIRY
Adapted from Patton (2002: 544–5)

including acts of inquiry. Denzin (1997), Neimeyer (1993) and Potter (1996) have articulated and work within the traditions of social constructionism and constructivism. Constructivist criteria applied to evaluation provide the foundation for *Fourth Generation Evaluation* (Guba and Lincoln, 1989) and sensitivity to multiple stakeholder perspectives (Greene, 1998a,b, 2000).

Artistic and Evocative Criteria

Qualitative analysis involves both science and art. Researchers and audiences operating from the perspective of traditional scientific research criteria emphasize the scientific nature of qualitative inquiry. Researchers and audiences that view the world through the lens of social construction emphasize qualitative inquiry as both science and art, and mix the two motifs. That brings us to this third alternative, which emphasizes the artistic and evocative aspects of qualitative inquiry, or what is sometimes called 'the narrative turn' in social science (Bochner, 2001). Keep in mind that these are matters of emphasis drawn here to highlight contrasts and not mutually exclusive or pure types. Artistic criteria focus on aesthetics, creativity, interpretive vitality, and expressive voice. Case studies become literary works. Poetry or performance art may be used to enhance the audience's direct experience of the essence that emerges from analysis. Artistically-oriented qualitative analysts seek to engage those receiving the work, to connect with them, move them, provoke and stimulate. Creative nonfiction and fictional forms of representation blur the boundaries between what is 'real' and what has been created to represent the essence of a reality, at least as it is perceived, without a literal presentation of that perceived reality. The results may be called creative syntheses, ideal-typical case constructions, scientific poetics, or any number of phrases that suggest the artistic emphasis.

Artistic expressions of qualitative analysis strive to provide an experience with the findings where 'truth' or 'reality' is understood to have a *feeling dimension* that is every bit as important as the cognitive dimension. The performance art of *The Vagina Monologues* (Ensler, 2001), based on interviews with women, but presented as theater, offers a prominent example. The audience feels as much as knows the truth of the presentation because of the essence it reveals. In the artistic tradition, the analyst's interpretive and expressive voice, experience, and perspective may become as central to the work as depictions of others or the phenomenon of interest. I tried my hand at creative nonfiction writing in examining coming of age processes in modern society, parenting, and what it means to be male in our times (Patton, 1999) and found the writing far more challenging, difficult, cathartic, and illuminative than the usual academic and evaluation reporting I had done for years. Qualitative inquiry illustrative of this emergent approach includes the works of Bochner and Ellis (2001), Goodall (2000), Richardson (2000a,b), Ellis and Bochner (1996, 2000) and Denzin (2000a, b). The artistic and evocative criteria also inform 'connoisseurship evaluation' (Eisner, 1991).

Critical Change Criteria

Those engaged in qualitative inquiry as a form of critical analysis aimed at social and political change eschew any pretense of open-mindedness or objectivity; they take an activist stance. For example, Critical Theory approaches fieldwork and analysis with an explicit agenda of elucidating power, economic, and social inequalities. The 'critical' nature of Critical Theory flows from a commitment to go beyond just studying society for the sake of increased understanding. Critical theorists set out to use research to critique society, raise consciousness, and change the balance of power in favor of those less powerful. Influenced by Marxism, informed by the presumption of the centrality of class conflict in understanding community and societal structures, and updated in the radical struggles of the 1960s, Critical Theory provides both philosophy and methods for approaching research and evaluation as fundamental and explicit manifestations of political praxis (connecting theory and action), and as change-oriented forms of engagement. Likewise, feminist inquiry often includes an explicit agenda of bringing about social change (e.g. Benmayor, 1991). Liberation research and empowerment evaluation derived, in part, from Paulo Freire's philosophy of praxis and liberation education articulated in his classics *Pedagogy of the Oppressed* (1970) and *Education for Critical Consciousness* (1973), which are still sources of influence and debate (e.g. Glass, 2001). Barone (2000: 247) aspires to 'emancipatory educational storysharing.' Qualitative studies informed by critical change criteria range from largely intellectual and research-oriented approaches that aim to expose injustices to more activist forms of inquiry that actually engage in bringing about social change. This category can include

collaborative and participatory approaches to fieldwork that are conducted in ways that build the capacity of those involved to better understand their own situations, raise consciousness, and support future action aimed at political change. Examples of a range of critical change approaches to qualitative inquiry can be found in work on feminist methods (e.g. Reinharz, 1992) and critical theory (e.g. Fonte, 2001). Critical change criteria undergird empowerment evaluation (Fetterman, 2000), diversity-inclusive evaluation (Mertens, 1998, 1999) and aspects of deliberative democratic evaluation that involve values-based advocating for democracy (House and Howe, 2000). While the term 'critical' gets used in many different ways and contexts in relation to research and theory, what it almost always connotes is an interest in and commitment to social change.

Pragmatic Utilitarianism

Earlier, in describing my approach to the first edition, I explained my pragmatic, utilitarian stance. The evaluation profession has adopted standards that call for evaluations to be useful, practical, ethical and accurate (Joint Committee on Standards for Educational Evaluation, 1994; the complete standards are available through the AEA website: http://www.eval.org). Implementation of a utility-focused, feasibility-conscious, propriety-oriented, and accuracy-based evaluation requires situational responsiveness, methodological flexibility, multiple evaluator roles, political sophistication, and substantial doses of creativity (Patton, 1997). The focus is on answering concrete questions using practical methods and straightforward analysis while appreciating that those who use evaluations apply both 'truth tests' – are the findings accurate and valid? – and 'utility tests' – are the findings relevant and useful? (Weiss and Bucuvalas, 1980). Using this set of criteria, one can engage in straightforward qualitative inquiry answering concrete questions aimed at largely descriptive answers, e.g. what do participants in programs report as strengths and weaknesses, without locating the inquiry within some major philosophical, ontological, or epistemological tradition. Grassroots practitioners have concrete questions and information needs that can be answered in straightforward ways through qualitative inquiry and they judge the answers pragmatically by their utility, relevance, and applicability.

Mixing and Changing Perspectives

The five frameworks just reviewed show the range of criteria that can be brought to bear in judging a qualitative study. They can also be viewed as 'angles of vision' or 'alternative lenses' for expanding the possibilities available, not only for critiquing inquiry but also for undertaking it. While each set of criteria manifest a certain coherence, many researchers mix and match approaches. The work of Tom Barone (2000), for example, combines aesthetic, political (critical change) and constructivist elements. As an evaluator, I have worked with and

mixed criteria from all five frameworks to match particular designs to the needs and interests of specific stakeholders and clients (Patton, 1997). But any particular evaluation study has tended to be dominated by one set of criteria with a second set as possibly secondary.

These five alternative sets of criteria for engaging in and judging the quality of qualitative inquiry show the great diversity that now characterizes qualitative methodology. The emergence of this diversity *within* qualitative inquiry and the end, for all practical purposes, of the qualitative–quantitative debate, strike me as the singular most important developments of the last two decades and the developments likely to have the greatest impact on the future of qualitative methodology. The old qualitative–quantitative debate treated qualitative inquiry as a monolithic approach. We now know it to be a splendid and diverse mosaic of inquiry approaches.

In the brief sections that follow I want to highlight a few other dimensions of qualitative inquiry that have changed over time and that strike me as particularly important in understanding the current status and stature of qualitative methods.

Purpose as Context

I am often asked: 'Which research design is best? Which strategy will provide the most useful information to decision makers?' No simple and universal answers to these questions is possible. The answer in each case depends on the purpose of the study, the scholarly or evaluation audience for the study (what intended users want to know), the funds available, the political context, and the interests/abilities/biases of the researchers.

Purpose and audience, then, guide design and analysis. The typology of inquiry purposes I have offered in the book distinguishes basic research, applied research, summative evaluation research, formative evaluation, and action research. These varying purposes affect design and analysis because they involve different norms and expectations for what will be concluded, how it will be presented, and whom it is for – the critical issue of intended users or audience. These different inquiry purposes add a cross-cutting layer of complexity to the alternative sets of criteria reviewed previously. Over the last two decades, it seems to me, the importance of matching design and analysis to purpose has become ascendant in applied social science and evaluation, which was not the case when I began doctoral studies some 30 years ago.

Purposeful Sampling

Purposeful sampling is one of the core distinguishing elements of qualitative inquiry. Perhaps nothing better captures the difference between quantitative and qualitative methods than the different logics that undergird sampling approaches. Qualitative inquiry typically focuses in depth on relatively small samples, even

single cases (n = 1), selected *purposefully*. Quantitative methods typically depend on larger samples selected randomly. Not only are the techniques for sampling different, but the *very logic* of each approach is unique because the purpose of each strategy is different.

While the purpose of probability-based random sampling is generalization from the sample to a population, what would be 'bias' in statistical sampling, and therefore a weakness, becomes the intended focus in qualitative sampling, and therefore a strength. The logic and power of purposeful sampling lies in selecting *information-rich* cases for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the inquiry, thus the term *purposeful* sampling. Studying information-rich cases yields insights and in-depth understanding rather than empirical generalizations. For example, if the purpose of an evaluation is to increase the effectiveness of a program in reaching lower-socioeconomic groups, one may learn a great deal more by studying in depth a small number of carefully selected poor families than by gathering standardized information from a large, statistically representative sample of the whole program. Purposeful sampling focuses on selecting information-rich cases whose study will illuminate the questions under study.

In every new edition of my qualitative text, I have added new types of purposeful sampling and increased the number of illustrations of sampling variations. In the end, what we have something to say about is what we have sampled. Understanding the importance of and variations in purposeful sampling has been a critical development of the last two decades, one now often taken for granted, but 20 years ago the strategies and varieties of sampling had not been articulated, so we were left with the general impression that qualitative inquiry just meant small samples and case studies. Now we can choose a precise purposeful sampling strategy to fit a specific kind of inquiry. This is the kind of development that contributed to the demise of the qualitative–quantitative debate.

Mixed Strategies and Methods, Emergent Designs, and Flexibility

A general though by no means universal consensus has emerged that mixing methods can be both appropriate and rigorous. Guba and Lincoln (1988), in contrast, have argued that the internal consistency and logic of each approach, or paradigm, militates against methodological mixing of different inquiry modes and data-collection strategies (quantitative and qualitative). Their cautions are not to be dismissed lightly. Mixing parts of different approaches is a matter of philosophical and methodological controversy. Yet, the practical mandate in evaluation (cf. Patton, 1981) to gather the most relevant possible information for evaluation users outweighs concerns about methodological purity based on epistemological and philosophical arguments. The intellectual mandate to be open to what the world has to offer surely includes methodological openness.

In practice it is altogether possible to combine approaches, and to do so creatively, just as machines that were originally created for separate functions like printing, faxing, scanning, and copying have now been combined into a single integrated technological unit, so too methods that were originally created as distinct, stand-alone approaches can now be combined into more sophisticated and multi-functional designs.

Advocates of methodological purity argue that a single evaluator cannot be both deductive and inductive at the same time, or cannot be testing predetermined hypotheses and still remain open to whatever emerges from open-ended, phenomenological observation. Yet, in practice, human reasoning is sufficiently complex and flexible that it is possible to research predetermined questions and test hypotheses about certain aspects of a program while being quite open and naturalistic in pursuing other aspects of a program. In principle, this is not greatly different from a questionnaire that includes both fixed-choice and open-ended questions. The extent to which a qualitative approach is inductive or deductive varies along a continuum. As evaluation fieldwork begins, the evaluator may be open to whatever emerges from the data, a discovery or inductive approach. Then, as the inquiry reveals patterns and major dimensions of interest, the evaluator will begin to focus on verifying and elucidating what appears to be emerging – a more deductively oriented approach to data collection and analysis. Emergent designs, dependent on flexibility and openness, foster creativity and adaptability – and differ dramatically from rigid blueprint and fixed protocol approaches.

The extent to which a study is naturalistic in design is also a matter of degree. This applies particularly with regard to the extent to which the investigator places conceptual constraints on or makes presuppositions about the program or phenomenon under study. In practice, the naturalistic approach may often involve moving back and forth between inductive, open-ended encounters to more hypothetical-deductive attempts to verify hypotheses or solidify ideas that emerged from those more open-ended experiences, sometimes even manipulating something to see what happens.

These examples of variations in qualitative approaches are somewhat like the differences between experimental and quasi-experimental designs. Pure experiments are the ideal; quasi-experimental designs often represent what is possible and practical. Likewise, full participant observation over an extended period of time is the qualitative ideal. In practice, many acceptable and meaningful variations to qualitative inquiry can be designed.

This spirit of emergence, adaptability, and creativity in designing studies is aimed at being pragmatic, responsive to real-world conditions and, when doing evaluations, to meeting stakeholder information needs. Mixed methods and strategies allow creative research adaptations to particular settings and questions. Recent examples of the increased attention to mixed methods include

Sandelowski (2000), Greene and Caracelli (1997), Tashakkori and Teddlie (1998), Morgan (1998), Smith (1994), and Newman et al. (1998).

The Creative Core of Analysis

Qualitative analysis transforms data into findings. No formula exists for that transformation. Guidance, yes. But no recipe. Medieval alchemy aimed to transmute base metals into gold. Modern alchemy aims to transform raw data into knowledge, the coin of the information age. Rarity increases value. Fine qualitative analysis remains rare and difficult – and therefore valuable. While the fundamental value of open-ended interviews and observational data have become widely appreciated, analysis remains controversial precisely because it is so inquirer-dependent.

Metaphors for analysis abound. Analysis begins during a larval stage that, if fully developed, metamorphoses from caterpillar-like beginning into the splendor of the mature butterfly. Or this: the inquirer acts as catalyst on raw data, generating an interaction that synthesizes new substance born anew of the catalytic conversion. Or this: findings emerge like an artistic mural created from collage-like pieces that make sense in new ways when seen and understood as part of a greater whole.

Consider the patterns and themes running through these metaphors. Transformation. Transmutation. Conversion. Synthesis. Whole from parts. Sense-making. Such motifs run through qualitative analysis like golden threads in a royal garment. They decorate the garment and enhance its quality, but they may also distract attention from the basic cloth that gives the garment its strength and shape – the skill, knowledge, experience, creativity, diligence, and work of the garment maker. No abstract processes of analysis, no matter how eloquently named and finely described, can substitute for the skill, knowledge, experience, creativity, diligence, and work of the qualitative analyst. It took me a long time to make my peace with this understanding. Now, after more than two decades of practice, I revel in the uncertainties, ambiguities, and creativity of qualitative analysis.

Colleagues have clearly wrestled as well with how to describe the analytical process. Stake (1995) writes of the *art* of case study research. Van Maanen (1988) emphasizes the story-telling motifs of qualitative writing in his ethnographic book on telling tales. Golden-Biddle and Locke (1997) make 'story' the central theme in their book on *Composing Qualitative Research*. Corrine Glesne (1999), a researcher and a poet, begins with the story analogy, describing qualitative analysis as 'Finding Your Story,' then later represents the process as 'Improvising a Song of the World.' Lawrence-Lightfoot and Davis (1997) call to mind 'portraits' in naming their form of qualitative analysis *The Art and Science of Portraiture*. Brady (2000) explores 'Anthropological Poetics.' Janesick (2000) evokes dance in 'The Choreography of Qualitative Research

Design,' which suggests that, for warming up, we may need 'stretching exercises' (Janesick, 1998). Hunt and Benford (1997) call to mind theater as they use 'Dramaturgy' to examine qualitative inquiry. Richardson (2000b) reminds us that qualitative analysis and writing do not just involve us in making sense of the world, but also in making sense of our relationship to the world and therefore in discovering things about ourselves even as we discover things about some phenomenon of interest. That was certainly my experience in my foray into creative nonfiction writing mentioned earlier (Patton, 1999). In this complex and multifaceted analytical integration of disciplined science, creative artistry, and personal reflexivity we mold interviews, observations, documents and field notes into 'findings.'

The challenge of qualitative analysis lies in making sense of massive amounts of data. This involves reducing the volume of raw information, sifting trivia from significance, identifying significant patterns and constructing a framework for communicating the essence of what the data reveal. The challenge is that there are not and cannot be formulas for determining significance. No ways exist of perfectly replicating the researcher's analytical thought processes. No straightforward tests can be applied for reliability and validity. In short, no absolute rules exist except perhaps this: Do your very best with your full intellect to fairly represent the data and communicate what the data reveal given the purpose of the study.

Guidelines for analyzing qualitative data can be found in abundance and studying examples of qualitative analysis can be especially helpful. But guidelines, procedural suggestions, and exemplars are not rules. The human factor is the great strength and the fundamental weakness of qualitative inquiry and analysis – a scientific two-edged sword. Thus, *analysts have an obligation to monitor and report their own analytical procedures and processes as fully and truthfully as possible*. This means that qualitative analysis is a new stage of fieldwork in which analysts must observe their own processes even as they are doing the analysis. The final obligation of analysis is to analyze and report on the analytical process as part of the report of actual findings. The extent of such reporting will depend on the purpose of the study.

Qualitative Software

I am encountering more and more reports and dissertations that open their analysis discussion with details about the software program that was used. I find myself both amused and alarmed by this effort at increasing the credibility of analysis by associating it with computer software, as if this removed, or at least reduced, the human and creative core of qualitative analysis. I do not remember ever seeing a statistical analysis that opened by stating, I used SPSS to run regression analysis followed by an in-depth advertisement for the wonders and merits of SPSS.

Computers and software are tools that facilitate qualitative analysis, but they do not really do the analysis. Qualitative software programs facilitate data storage, coding, retrieval, comparing, and linking – but human beings do the analysis. Software has eased significantly the old drudgery of manually locating a particular coded paragraph. Analysis programs speed up the processes of locating coded themes, grouping data together in categories, and comparing passages in transcripts or incidents from field notes. But the qualitative analyst doing content analysis must still decide what things go together to form a pattern, what constitutes a theme, what to name it, and what meanings to extract from case studies. The human being, not the software, must decide how to frame a case study, how much and what to include, and how to tell the story. While computers can play a role in qualitative analysis as they do in quantitative analysis, they cannot provide the creativity and intelligence that make each qualitative analysis unique.

What began as distinct software approaches have become more standardized as the various packages have converged to offer similar functions, though sometimes with different names for the same functions. They all facilitate marking text, building codebooks, indexing, categorizing, creating memos, and displaying multiple text entries side-by-side. Import and export capabilities vary. Some support teamwork and multiple users more than others. Graphics and matrix capabilities vary, but are becoming increasingly sophisticated. All take time to learn to use effectively. The greater the volume of data to be analyzed the more helpful these software programs are. Moreover, knowing which software program you will use before data collection will help you collect and enter data in the way that works best for a particular program.

Qualitative discussion groups on the Internet regularly discuss, rate, compare, and debate the strengths and weaknesses of different software programs. While preferences vary, these discussions usually end with consensus that any of the major programs will satisfy the needs of most qualitative researchers. Increasingly, distinctions depend on 'feel,' 'style,' and 'ease of use' – matters of individual taste – more than differences in function. Still, differences exist and new developments can be expected to solve existing limitations. And, though software analysis has become common and many swear by it, and it can offer leaps in productivity for those adept at it, it is not a requisite for qualitative inquiry.

Ethical Challenges in Qualitative Inquiry

A final area of major development over the last two decades concerns the ethical dimensions of qualitative inquiry. We are becoming more and more aware, for example, that interviews can be and often are interventions. They affect people. A good interview lays open thoughts, feelings, knowledge, and experience, not only to the interviewer, but also to the interviewee. The process of being taken

through a directed, reflective process affects the persons being interviewed and leaves them knowing things about themselves that they did not know – or least were not fully aware of – before the interview. Two hours or more of thoughtfully reflecting on an experience, a program or one's life can be change-inducing; 10, 15, or 20 hours of life history interviewing can be transformative – or not. Therein lies the rub. Neither you nor the interviewee can know, in advance, and sometimes even after the fact, what impact an interviewing experience will have or has had.

Confidentiality norms are also being challenged by new directions in qualitative inquiry. Traditionally, researchers have been advised to disguise the locations of their fieldwork and change the names of respondents, usually giving them pseudonyms, as a way of protecting their identities. The presumption has been that the privacy of research subjects should always be protected. This remains the dominant presumption, as well it should. It is being challenged, however, by participants in research who insist on 'owning their own stories'. Some politically active groups take pride in their identities and refuse to be involved in research that disguises who they are. Some programs that aim at empowering participants emphasize that participants 'own' their stories and should insist on using their real names. I encountered women in a program helping them overcome a history of violence and abuse who were combating the stigma of their past by telling their stories and attaching their real names to their stories as part of healing, empowerment and pride. Does the researcher, in such cases, have the right to impose confidentiality against the wishes of those involved? Is it patronizing and disempowering for a university-based human subjects committee to insist that these women are incapable of understanding the risks involved if they choose to turn down an offer of confidentiality? On the other hand, by identifying themselves they give up not only their own privacy, but perhaps that of their children, other family members, and current or former partners.

The issues of whether and how to compensate interviewees involve questions of both ethics and data quality. Will payment, even of small amounts, affect people's responses, increasing acquiescence or, alternatively, enhancing the incentive to respond thoughtfully and honestly? Is it somehow better to appeal to people on the basis of the contribution they can make to knowledge or, in the case of evaluation, improving the program, instead of appealing to their pecuniary interest? Modest payments in surveys can increase response rates to ensure an adequate sample size. Does the same apply to depth interviewing and focus groups? The interviewer is usually getting paid. Should not the time of interviewees be respected, especially the time of low income people, by offering compensation? What alternatives are there to cash for compensating interviewees? In western capitalist societies issues of compensation are arising more and more often both because people in economically disadvantaged communities are

reacting to being overstudied and undervalued, and because private sector marketing firms routinely compensate focus group participants, so this practice has spread to the public and non-profit sectors.

These are but a few examples of the ethical challenges that have emerged in recent years. I expect ethical concerns to shape dramatically the future of qualitative methodology.

Two Decades Summary

So there you have it, a whirlwind and all-too-brief tour of my personal experiences of and perspective on two decades of developments in qualitative inquiry viewed through the lens of three editions of my qualitative textbook. It was difficult deciding which developments to highlight, but this is the list, for better or worse, that I ended up with:

- the end, in essence, of the qualitative–quantitative debate;
- the flowering of distinctly diverse and competing approaches within qualitative inquiry, including distinct criteria for judging and differentiating quality;
- the increased acceptance and importance of mixed strategies and methods, emergent designs, and flexibility and adaptability in fieldwork;
- the elaboration of purposeful sampling approaches;
- ever-increasing appreciation and recognition of the creativity at center of qualitative analysis, despite
- the emergence of ever more sophisticated software to facilitate and support qualitative analysis; and
- new ethical challenges and concerns as we understand better the potential impacts of qualitative inquiry on both those studied and those engaged in the inquiry, and as new forms of participatory inquiry and emergent designs challenge traditional views on informed consent and confidentiality.

Looking Ahead

In 1980 I could not have imagined the changes outlined in this article much less two more editions of my qualitative book. Now I cannot imagine qualitative methodology remaining stagnant. It is, I think, by its very open and emergent nature, and by the kinds of researchers and practitioners attracted to it, an inquiry mode subject to ongoing development. In my youth I feared my books getting outdated. Now I anticipate and even look forward to the changes that require new thinking, new practices, new approaches, and therefore new editions of methods textbooks.

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Michael Quinn Patton is an independent organizational development and program evaluation consultant. He is former President of the American Evaluation Association and author of *Utilization-Focused Evaluation* (3rd edn., Sage, 1997), *Qualitative Research and Evaluation Methods* (3rd edn., Sage, 2002), and *Grand Canyon Celebration: A Father-Son Journey of Discovery* (Prometheus, 1999), which was a finalist for Minnesota Book of the Year in 1999 (creative nonfiction category). He is recipient of both the Myrdal Award for 'Outstanding Contributions to Useful and Practical Evaluation Practice' from the Evaluation Research Society and the Lazarsfeld Award for 'Lifelong Contributions to Evaluation Theory' from the American Evaluation Association. He serves on the graduate faculty of The Union Institute and University, a nontraditional, interdisciplinary, nonresidential, individually designed doctoral program. He helped design and trains in the Leadership Labs on Outcomes in Minnesota, which has worked with over 600 non-profit, government and philanthropic executives on leadership for results. [email: MQPatton@prodigy.net]