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Choosing a Research Design for Qualitative Research – A Ferris Wheel of Approaches

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Introduction

Entering a conversation midstream can be awkward, especially when it is about offering practical guidance for what to do next. Yet that is what is being asked of this chapter on choosing a research design. The chapter itself sits at the front end of a two-volume treatise on qualitative research designs. Structurally, this tells you something about the work that is useful to do *before* you get to the step of choosing, and it also speaks to the work that will remain *after* that selection is made. There is little doubt that the choice is significant for your journey; nonetheless, it sits within a larger and iterative set of decisions.

We will posit four interrelated reasons why it is difficult for us to offer practical guidance when we start in the midst of your journey. First, choosing a design sits somewhere between thinking about a research topic area conceptually and acting on it concretely. For many, exploring new areas of interest begins with eclectic and wide-ranging reading. This might include mulling over theoretical, empirical, and topical literature and letting those ideas rattle around for a while. However, at some point all these big ideas must get funneled into a concrete plan of action with limitations and constraints. Choosing a design puts you at this nexus of the conceptual and the concrete. We cannot know where you are in your readiness to make the move from conceptual exploration to forging a comparatively narrow path forward.

Second, choosing a design sits at the crux of philosophical views and the actionable *interpretation* of those views. We will argue that in the best designed qualitative studies, there is an alignment between the researcher's epistemological worldviews and the way the actionable steps are assembled and executed. For example, deciding what you will call your participants/subjects/interlocutors, how you will construct your interview questions (see Roulston and Halpin, Chapter 40, this *Handbook*), who has final say over the interpretation of the evidence, or how conclusions will be disseminated should be logically aligned with your ontological, epistemological, and axiological worldviews. We cannot know where you are in your reflexive investigation of your own worldviews and how you plan to translate them into actionable research steps.

Third, the verb used in this chapter title, *choosing*, suggests that you have some idea about the variety of options available. In other words, it is helpful to have some knowledge about the overall landscape. We argue that this knowledge might involve not only breadth (the *variety* of choices open to you) but also depth (the similarities and differences between choices). The more you know, the better informed your choice will be. We also argue that sometimes you may change directions during the process. During your exploration, you may find better options. We cannot know where you stand right now in this broad field of knowledge.

Finally, choosing a design is not an activity that happens outside of personal, political, historical, and institutional contexts. For example, influences on your decision may include the need for funding (see Cheek, Chapter 21, this *Handbook*), the pressure associated with job advancement (e.g. hire, tenure, promotion), the politics of your institution, the relative acceptance by your home institution of a spectrum of options, and the scholarly traditions within which you are operating. Actors in your research networks, such as colleagues, mentors, journal editors, and dissertation committees, may be on your mind as you select. You may want to do your own reflexive analysis of your environment, assessing where you are situated in power hierarchies, how much flexibility or how many degrees of freedom you have in which to operate, or how comfortable you are with professional risks in regard to your choice.

To illustrate the diversity of ways in which the choosing process may start in actual practice – as well as the complexities associated with different starting points – we draw upon our own experiences as faculty (Staller) and doctoral student (Chen) in the field of social work (see Gilgun, Chapter 66, this *Handbook*).

Disciplinary Differences

In our home university, social work doctoral training is connected with one of four allied social sciences. Most frequently this is either anthropology, psychology, or sociology. Doctoral students looking for help in choosing a qualitative research design often find their way to Staller. These students have been exposed to different disciplinary traditions, school cultures, and research training systems at the time when they first seek consultation. What is significant for our purposes is that they often arrive at Staller's office at different starting points relative to their journey.

When anthropology students arrive, they already know they will be conducting an ethnography (see Buscatto, Chapter 28, this *Handbook*), because the entire discipline of anthropology has been built around this partic-

ular approach to knowing. A general methodology has been predetermined for them. Nonetheless, that does not end the work they need to do in choosing their research design. They will have to decide where to situate themselves within an array of different ethnographic traditions. While some students are interested in engaging in public scholarship, which can be readily applied to social work practice (see Gilgun, Chapter 66, this *Handbook*), others might prefer to take a theoretical path, with fewer immediate practical implications. While some are passionate about autoethnography as a specific approach, others may want to experiment with netnography to attend to the increasingly significant digital world. Each decision speaks to where students will situate themselves epistemologically and suggests variations in the design efforts which will follow.

In fairly stark contrast, students in sociology or psychology (see Riley and Chamberlain, Chapter 67, this *Handbook*) face a different set of initial challenges. These disciplines are not as historically linked to a unique methodology, although arguably sociologists frequently use survey methodologies while psychologists often use experimental designs, such as randomized controlled trials (RCTs). Given that both survey research and RCTs tend to be aligned with positivist or post-positivist paradigms, these students invariably arrive wishing to explore alternatives.

They often express a desire to do ‘qualitative’ rather than ‘quantitative’ work. Such an inclination may be motivated by their wish to do research with more human engagement than numbers and statistics allow. For example, social work scholars often want to make sure whatever research design they choose will involve community members as partners or promote social change. They often consider strategies such as community-based participatory research, photovoice, or other transformative designs (see Mertens, Chapter 72, this *Handbook*). Students may express commitment to giving voice to participants in their studies, thus hoping to include interviews (see Roulston and Halpin, Chapter 40, this *Handbook*) or focus groups (see Caillaud et al., Chapter 41, this *Handbook*) in their study design. Possibly they have heard about phenomenology (see Eberle, Chapter 7, this *Handbook*) or grounded theory (see Thornberg and Keane, Chapter 27, this *Handbook*), which has piqued their interest.

Given the full panoply of methodologies that are available to these students from the start, they have more complicated tasks of selection than do the anthropology students. Nonetheless, once nested within an approach, they will still face epistemological questions similar to those faced by their anthropologist colleagues. For example, they will have to decide which tradition within grounded theory they might use: one resting on social construction, such as that promoted by Charmaz, or another resting on a more positivist foundation, like Glaser and Strauss. Or within phenomenological traditions, they might choose how closely they will ad-

here to van Manen's advice or whether they find variations, such as interpretative phenomenological analysis (IPA), more comfortable (Smith et al., 2009; van Manen, 2017).

Learning from Others

Interestingly, despite a treasure trove of books on qualitative research methods, relatively few address the distinct step in the process we have been tasked with, namely, *choosing a research design*. Among those that address this issue, a popular means of doing so is presenting several methodologies side by side and comparing them across their fundamental design features. One of the best-known books in this vein was written by John Creswell and later co-authored by Cheryl N. Poth (2017), entitled *Qualitative inquiry and research design: Choosing among five traditions*, now in its fourth edition. The five traditions addressed are narrative research, phenomenology, grounded theory, ethnography, and case study (see also Flick, Chapter 1, this *Handbook*).

We highly recommend this as a helpful resource. Yet for our purposes, there are limitations to this comparative approach, particularly for more advanced researchers. First, the authors have created a definitive subset of strategies, thus limiting the overall choice set. Second, they have often picked a philosophical or epistemological position within and perhaps across the methodologies. This potentially limits the variety of stances that might be taken by the researcher. The net result is that this is a simplified, incomplete approach to the choosing process.

A Ferris Wheel Model

We propose a different model for choosing a research design, which attempts to accommodate the variety of places people start their journey and the complexity the process entails. We do not see making a choice as one discrete step but rather focus on *choosing* as an active verb such that the researcher faces a multi-step process.

Whether the Big O in Tokyo, the Wheel of Fate in the Philippines, the London Eye, or the Centennial Wheel in Chicago, the basic structure of a Ferris wheel offers a visual inspiration for our model (see Figure 5.1). You start your journey boarding the Ferris wheel in any one of its many passenger cars. Our cars represent differ-

ent starting points in that process. We see the Ferris wheel ride as representing the full range of considerations necessary in choosing a design. Along the way, considerations will likely include the ontological–epistemological orientation of the researcher, axiological concerns, the methodological package, arrangements of methods and steps, and the role of theory. We suggest that the process of choosing, once started, requires a full turn of the cycle before declaring the act of selection completed. No single passenger car is a better place in which to begin the ride, but none is sufficient alone without further engagement of the ride itself. You might start your journey where you feel most comfortable, depending on your own positionality, inclinations, and existing knowledge.

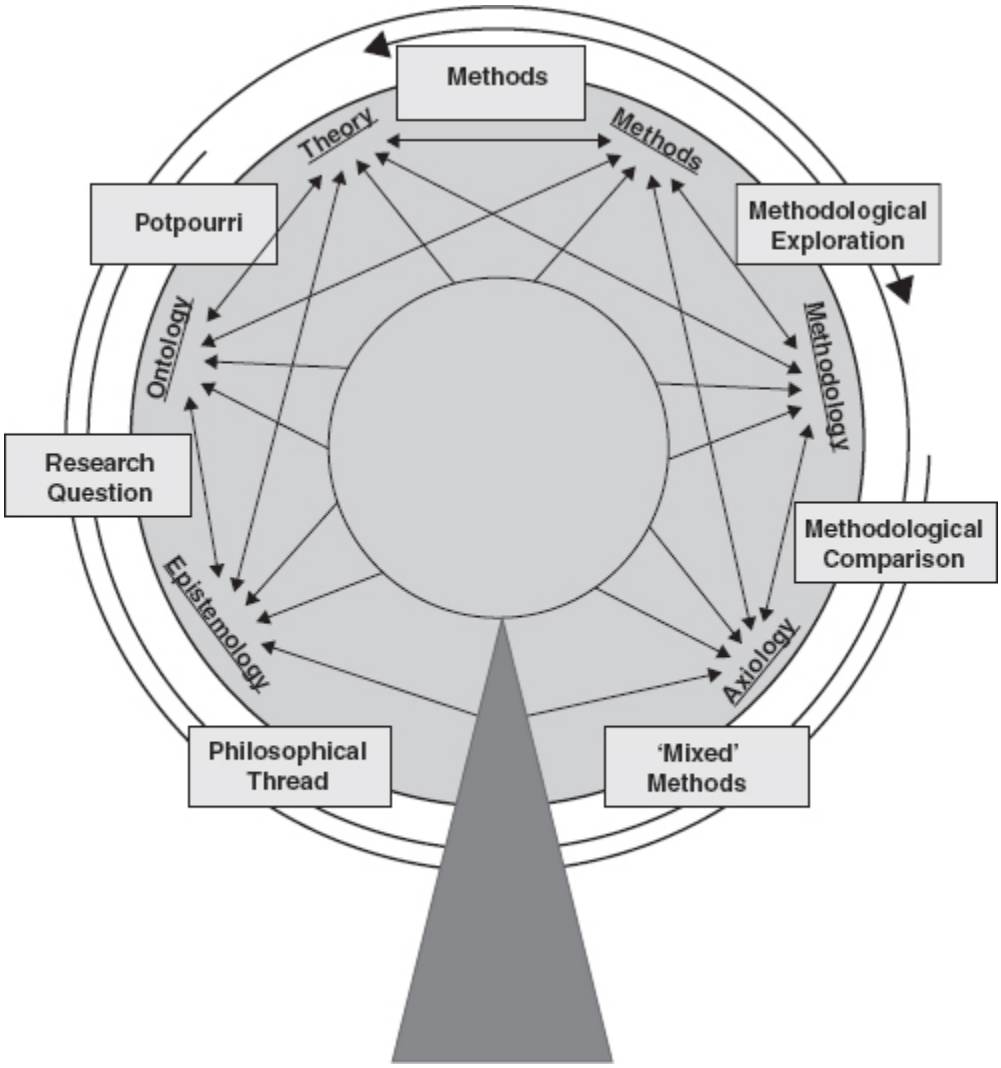

Figure 5.1 The Ferris wheel model of approaches

A Word about Terminology: Nested Definitions and Usage

Before describing the model's components, we need to clarify our terminology. We have used words such as epistemology, methodology, and method – concepts that are commonly used in discussions of qualitative research but whose meanings are debated among scholars (see, e.g., Carter and Little, 2007; Crotty, 1998; Guba and Lincoln, 2004; Padgett, 2008). You have probably developed your own definitions of these terms in your own scholarship or through your own reading. We hasten to say that we are neither asking you to agree with nor to conform to our definitions. However, such clarification will help you understand how we are using these terms. The concepts we are concerned with – at this moment – are ontology, epistemology, methodology, methods, axiology, and theory.

The term ‘ontology’ appears more commonly in philosophy than in social sciences (see Koro et al., Chapter 10, this *Handbook*). It often shows up with other abstract terms such as ‘metaphysics’ or ‘existence', which are beyond the scope of our discussion. For our purposes, what we need to know is that ontology is concerned with the nature of reality. Classic ontological problems include whether God exists or whether reality exists independent from our cognition and subjective experiences.

Your ontological stance is intricately connected with your beliefs about what would be the best way of getting to know reality. In other words, ontology often goes hand in hand with epistemology – that is, theory of knowledge. For instance, if you believe that there is an objective world to be discovered, which follows universal laws and is outside of human perceptions and conceptions (ontological stance), you may think that such a world is knowable through discovering its underlying systems, which could be scientifically verified by the accumulation of observable evidence (epistemology: positivism). In this case, knowledge is believed to correspond with external reality (Comte, 2009). In contrast, if you believe that jointly developed understandings of human interactions fundamentally form our views of reality (ontological stance), you may think that getting to know such reality should center on how humans form conventions, construct meanings, and interpret social interactions (epistemology: social constructionism; (see Potter and Robles, Chapter 6, this *Handbook*). In this case, knowledge-building is part of reality-building (Berger and Luckmann, 1966; see Eberle, Chapter 7, this *Handbook*). These two examples are by no means an exhaustive list of possible ontological–epistemological frameworks, but they illustrate why an understanding of your ontological–epistemological worldview is useful.

‘Methodology’ is a more common word in research courses. We use methodology to refer to the entire package of steps and techniques that go into a research project. Placing methodology within the nest of concepts that includes ontology and epistemology, we argue that methodology is always informed by and responding to the particular ontological–epistemological framework embraced by the researcher. This ontological–epistemological framework might be explicitly identified or merely implicitly manifested. Thus, methodology is the practical realization of such a framework. A positivism-oriented methodology would be fundamentally different from a constructionism-oriented one.

Highlighting methodology as a comprehensive package, we distinguish methodology from methods – that is, the techniques and steps for collecting or analyzing empirical evidence. Practically speaking, a methodology is a particular combination of methods. Distinguishing methodology from methods helps us clarify three things. First, knowing that you are going to ‘do interviews’ is just a starting point and a small part of the total research design, which concerns the whole package and its underlying ontological–epistemological assumptions. Second, methods for collecting or analyzing evidence are rarely unique to a single methodology. You may use interviews as a method in ethnography or phenomenology or oral history. The ways in which these interviews are designed or analyzed will differ according to the researcher's specific ontological–epistemological worldviews. Third, treating methodology as a comprehensive combination of methods urges us to check the compatibility of different methods within a single study design. For example, we might associate coding with the proper method of analysis for interviews. However, if we locate the interview method within the methodology of critical discourse analysis (CDA), coding may become incompatible with CDA's ontological–epistemological commitment to contextualization.

Axiology is concerned with the theory of value. It addresses the ethics that guide the design and inform the execution of a research project. By including axiology in our nest of concepts, we highlight our position that research, and particularly social research, is always value laden. As social activities are embedded within specific personal, political, historical, and institutional contexts, all research projects are shaped by, and further shape, the social values of their contexts. Axiology urges researchers to be explicitly reflexive about how judgments are made on all dimensions and steps of their studies. Choosing a research design is thus an axiological practice. There are ethical assumptions and consequences regarding what part of reality is considered worthy of inquiry, what way of knowing such reality is deemed legitimate, what methods of gaining information are acceptable, and what applications of findings are ethically appropriate (Wilson, 2008; see Cannella, Chapter 22, this *Handbook*).

We broadly define theory as ‘a logically interrelated set of propositions about empirical reality’ (Schutt, 2021: 28). Such a definition allows us to account for the multiple roles theory may play in the choosing process. Where to locate theory in the overall research design is dependent on how it is being used. At the abstract level, epistemology could be generally defined as the theory of knowledge, and any particular epistemological orientation (e.g. positivism) is a theory of how one goes about knowing the world. In other words, you have already engaged with theory when you have settled on, explicitly or implicitly, an ontological–epistemological orientation for your study. On a more concrete level, researchers may engage with various theoretical frameworks (e.g. attachment theory or social learning theory) on the topics of their studies (e.g. early childhood development). The multidimensionality of theory is also important to consider. In a research project, you may apply an existing theory that guides the formation of the research questions. Others may design research projects for the purpose of testing the validity of a proposed theoretical model. There are also studies aimed at constructing a theory iteratively through the collection and analysis of empirical evidence (e.g. grounded theory) (Henwood, 2006). Therefore, you will want to be specific about what kinds of theories you are talking about and how you will engage with them.

A Dynamic-Cyclical Model

Let us return to our Ferris wheel imagery. We have argued that you may start at any entry point but that the full process of choosing a research design includes a cycle of considerations (including your ontological–epistemological orientation, guiding ethics, methodological package, methods of collecting and analyzing evidence, and the role of theory).

We are by no means the first to highlight these considerations and their interconnected nature in qualitative research. For instance, in an earlier article, Staller (2012: 403) proposed a hierarchically arranged set of concepts that range from ‘the philosophically abstract at the top’ to the ‘most down-to-earth practical action steps at the bottom’ for making qualitative research logically integrated. Crotty (1998) reverses Staller's sequential order by moving from the concrete to the abstract. Crotty starts with method then moves to methodology, epistemology, and ontology as his ending point. In either case, there is a linear thread running through their models.

Shawn Wilson (2008) also advocates for the seamless integration of ontology, epistemology, axiology,

methodology, and methods in research, albeit in a different arrangement. Grounded in the lived experiences and philosophical traditions of Indigenous, Aboriginal, native, First Nation, Indian, and Native American peoples, Wilson places these elements in a circle. He argues that

> putting ideas in a circle or wheel indicates that they are interrelated and that each blend into the next. It also implies that the ideas flow from one to the next in a cyclical fashion. A change in one affects the others, which in turn effects new change in the original. All parts of the circle are equal; no part can claim superiority over, or even exist without, the rest of the circle. (Wilson, 2008: 70)

The circle, unlike Staller's or Crotty's hierarchical portrayal of the concepts, manifests the centrality of relationality among Indigenous communities. According to Wilson, relationality is the ‘shared aspects of an indigenous ontology and epistemology', which should be ‘put into practice through choice of research topic, methods of data collection, form of analysis and presentation of information’ (Wilson, 2008: 7).

As an Indigenous methodologist, Wilson's ontological and epistemological worldview of relationality is fully on display throughout his presentation, from design to evidence collection and from reporting to writing his book, *Research is ceremony: Indigenous research methods* (2008). In contrast, Staller's training in Western colonial or settler educational systems led her to intuitively conceptualize the same basic ideas as a hierarchy of authority.

There are two significant points here. The first is about difference. Intuitively, the scholars reached for different conceptual portrayals, which were intrinsically connected to the ways they had been socialized to understand their worlds. The second has to do with similarity. Both scholars would likely agree that these ideas are interconnected and must be brought into balance for the well-being of the whole. The steps in the process can neither be dislodged from one another nor operate from differing ontological, epistemological, or axiological stances if they are to remain coherent.

Building on these discussions, we present our Ferris wheel of choosing a design as a logical integration of all the components through a dynamic-cyclical process. We are not arguing for a specific direction or sequence of considerations, although some passenger cars suggest next steps more intuitively than others. For example, if you start with a particular ontological–epistemological orientation (e.g. phenomenology; see Eberle, Chapter 7, this *Handbook*), you may turn next to a limited set of potential methodologies that are compatible. After deciding on a methodology, you arrange the specific methods for collecting and analyzing empirical

evidence. If, however, you start with the idea ‘I want to do interviews', where you turn next is less obvious. For some, the urge to do interviews may be connected to their axiological commitments to social change. For others, the epistemological assumptions underlying the kinds of interviews may be the next thing that comes to mind. The wheel is dynamic and flexible in this way. The one stable feature we recommend is that you go through a full turn of the cycle before exiting.

Next we take a closer look at the model's different passenger cabins. We propose seven options as starting points: the research question approach, the philosophical thread approach, the methodological comparison approach, the methodologies exploration approach, the methods approach, the potpourri approach, and the mixed-/multi-methods approach.

Entry Points on the Ferris Wheel

The Research Question Approach

In research methods courses, students (such as Chen) often hear that the research question determines methodology – a meaningful and well articulated question is the core of any research project and should guide the overall research design. It is that simple. But is it?

Staller's years of mentoring and Chen's journey arriving at a dissertation design seem to tell a different story. While it is essential that the research question and the choice of methodology align before completion of the design, the practical sequence of developing a research question (see Rapley, Chapter 16, this *Handbook*) first and choosing a methodology second may not be that straightforward. To illustrate, we need only ask this question: where do research questions come from?

Let us look at two scenarios. Here is Scenario 1: a student trained in quantitative traditions enters Staller's office, wondering ‘How do I even start to formulate a proper question for qualitative research? I know the area I want to study. I know I want to have people's voices heard. But I have only been trained in asking research questions in terms of variables and predictions'. The taken-for-granted unidirectional relationship between question and methodology assumes that researchers are always at a place of full preparedness – that is, that they have been fully exposed to, and can effectively engage with, a full range of possible paradigms

for framing questions – which is, in our experience, unrealistic. Returning to our model, we have learned that researchers make implicit judgments about how a question should be framed and what kinds of information can be legitimized as evidence based on their underlying ontological–epistemological orientations. Moreover, in different academic disciplines, students and scholars often do not get equal exposure to all epistemological orientations. Some sociocultural anthropologists may never have heard of an independent variable or a dependent variable. Some public health scientists may only have asked questions in terms of variable association or generalizable prediction. We are trained to ask particular kinds of questions. It often requires a painstaking process of unlearning and relearning if we want to escape our habitual epistemological worldviews.

Here is Scenario 2: Chen entered her doctoral program knowing her general area of research and her disciplinary orientations in social work and anthropology. She started with a set of topical interests (drug addiction, social work indigenization, post-socialist welfare), a geographical focus (mainland China), some theoretical curiosities (biopolitics, pragmatism, neo-institutionalism), and a broad sense of methodology (ethnography). During the first three years of her doctoral study, she struggled with distilling her interests to answerable research questions. Instead of following the question-to-design path, her research questions have been continually reformulated through back-and-forth processes of topical, methodological, theoretical, and empirical considerations. Knowing that she wanted to study on-the-ground, everyday social work practices in China, Chen was intuitively drawn to ethnography and conducted some preliminary fieldwork before knowing exactly how to formulate her research questions. Those informal explorations directed her to more literature and the reworking of her previously drafted questions. After three years of back and forth, Chen arrived at a better articulated question for the purpose of her study design (i.e. ‘how does social work negotiate its roles, legitimacy, and space of practice in the field of anti-drug interventions in contemporary urban China?'), which is aligned with her overall methodology (i.e. institutional ethnography; see Kutter and Masson, Chapter 62, this *Handbook*). During this process, framing the research question and choice of design were mutually constitutive. This scenario is not uncommon among qualitative researchers, who often start with a set of ideas about a research area that needs further articulation.

These two scenarios illustrate how the unidirectional question-to-design principle may not be useful in all research efforts. Not only are many students largely trained in asking only variable-driven questions but they often start with broad interests that need further nuancing. We are not suggesting that research questions don't eventually need to be aligned with the research design. On the contrary, our Ferris wheel model highlights

the intricate interconnection among all considerations during the process of choosing a design. We argue that the ways of asking research questions are often constrained by researchers' existing ontological–epistemological orientations and methodological training. Choosing a design frequently co-occurs with the activities of clarifying, modifying, rewriting, and engaging a variety of articulations of the research question. As a practical matter, if you are a researcher who has already framed your question, you may want to contemplate the traditions from which it stems. Alternatively, if you are struggling with expressing your question, riding the Ferris wheel may offer some insights.

The Philosophical Thread Approach

Not so long ago, several prominent researchers in our field wrote a fairly scathing critique of what they called postmodernism's 'detrimental influence' on social work because of its 'questioning the Enlightenment, criticizing established research methods, and challenging scientific authority' (Caputo et al., 2015: 638). They noted that postmodernism is 'often associated with such epistemological tenets as relative or subjective […] truth claims as representative of reality' (Caputo et al., 2015: 639), which, in their view, produce unreliable accounts rather than gain 'truthful' knowledge of the world. Their core recommendation is that social work science should adhere to epistemologies rooted in objectivist or realist traditions.

Not surprisingly, some qualitative researchers have responded (Berringer, 2019; Giertsen, 2019; Staller, 2016). While this is not the place to fully engage with their arguments, our point is that picking an approach for inquiry has a political dimension. In other words, contested philosophical views about what constitutes legitimate knowledge can become political in nature. Choosing a qualitative design may require staking a claim somewhere in this territory of philosophical orientations.

While political debates like these are sometimes expressed at the epistemological or ontological level, this is relatively unusual. More frequently they arise from a source of friction. Staller has adapted the notion of 'epistemological unconsciousness' to refer to the fact that objectivist epistemology is deeply embedded in the DNA of the Western academy. Qualitative researchers 'bump up against' privileged objectivist worldviews in everyday interactions, creating friction (Staller, 2012). These frictions can play out in funding, hiring, promotion, or peer review decisions. Those operating from privileged positions rarely need to investigate their own assumptions, because they are generally accepted. For those in more marginalized positions, it is useful to

be ‘multicultural’ in engaging with epistemological diversity, not only to understand the conflict but also to better justify and defend their own positions.

In response to these epistemological politics, Staller (2012) has long advocated for researchers knowing their epistemological position as a prerequisite for choosing (and constructing) a research design. Here, we modify that position. We soften the assertion that this must be the *first* step in the process. Instead, we argue it is *one* of the possible entry points. Yet we firmly hold that reflexively engaging with your epistemological positioning is an important activity during the process of choosing, because it anchors your choice and helps align the component parts of your research design.

Recently, Staller was confronted with a student who was struggling with articulating his epistemological orientation. For him, starting with the philosophical thread seemed confusing. He asked how to ‘discover his epistemology'. It was interesting that in many ways the student's epistemological preference revealed itself with every question he asked. Even his framing of ‘discovering preference’ might be a hint about how he understood the world. He had previously expressed suspicion about the subjective nature of relativism. He was uncomfortable with not having objective standards for evaluating rigor. He was interested in ensuring strict adherence to a codebook during analysis and desired a consensus among a team of coders. Each of these suspicions and concerns revealed something about his theories of knowledge. Yet seeing the connection between his specific questions and his belief system was difficult for him to decipher on his own. Staller's response was that he could *discover* his epistemological preferences by reflexively investigating the sources of discomfort embedded in his own questions.

For other researchers, starting with the philosophical thread is natural and comfortable. They relish picking up books about the evolution of phenomenology (see Eberle, Chapter 7, this *Handbook*), symbolic interactionism, and ethnomethodology (see Hoey, Chapter 30, this *Handbook*). They may engage with debates between proponents of classic phenomenology and those advocating an interpretative phenomenology lens. They may contemplate the politics of representation and the role of self-reflexivity in ethnography. For them, starting with the philosophical thread is an intuitive entry car to the Ferris wheel process of choosing a design.

Yet for others, such as Staller's student described above, this poses a more difficult starting point. There are other points of entry onto the Ferris wheel available to them. Nonetheless, we encourage students and scholars to read basic summaries of these philosophic debates. For example, Egon Guba, Yvonna Lincoln, and Norman Denzin have written classic treatises on positivism, post-positivism, critical theory, and construc-

tivism, among possible approaches to research. Creswell and Poth (2017) have taken up post-positive, social construction, advocacy/participatory, and pragmatic approaches. Korstjens and Moser (2017) engage with discussions on social constructionism. Padgett (2016) traces the rise of constructivism and the postmodern debates of the 1980s, also exploring a variety of inward-turning methodologies such as personal memoirs and poetic reflections. Harper (2012) considers realism, phenomenology, and social constructionism, helpfully pointing out that these might be considered on a continuum from realism to relativism.

We propose that exploring your embodied philosophical worldviews can provide a starting point for choosing a design. You can also start somewhere else and end up with a design, as in Crotty's (1998) reverse ordering. Nevertheless, we urge you to consider engaging with the entire circle, as noted by Wilson (2008).

The Methodological Comparison Approach

As stated above, the most popular way of helping researchers choose a design comes in the form of methodological comparisons. Astalin (2013) acknowledges that '[i]t is very clear that the differences between the assorted qualitative research designs can be difficult to understand at first'. For this reason, it is helpful when scholars who are experienced researchers select a set of popular methodologies and set them side by side for the novice researcher, highlighting similarities and differences. We offer this as another excellent passenger cabin through which to enter the process. However, we contend that it is not sufficient in and of itself.

The methodologies selected by these writers vary, although they tend to orbit a handful of the most popular and historically well established traditions. Creswell and Poth (2017) offer a classic example, examining narrative, phenomenological, grounded theory, ethnography, and case study research. Similarly, Korstjens and Moser (2017) consider ethnography, phenomenology, and grounded theory in nursing research. In social work, Padgett (2008) lays out six common approaches: ethnography, grounded theory, case studies, and narrative, phenomenological, and action research.

We will not make the actual comparisons, because other contributors to this volume elaborate on them in detail. However, broadly speaking, ethnography (see Buscatto, Chapter 28, this *Handbook*) asks questions about people and cultures. Grounded theory (see Thornberg and Keane, Chapter 27, this *Handbook*) is interested in the study of social processes with the goal of producing low- to mid-level theory. Phenomenology explores the nature of the meaning of lived human experiences (see Eberle, Chapter 7, this *Handbook*).

Action-based research seeks to promote social change. Once these differences are noted, the authors next walk the reader through the steps in the process, such as how a research question is framed, what empirical evidence would be collected, how it might be analyzed, and what a final report might look like. The net result is that novice researchers can experiment with their topical interests by considering them through different methodological lenses.

The comparative approach is useful to beginners starting the selection process. However, as editor of a journal specializing in qualitative methods, Staller (2019) often sees manuscript submissions that cite only one such comparative textbook or journal article as the writer's methodological authority. We argue that this is insufficient by itself and recommend three additional steps.

First, we encourage you to do extensive reading on the selected methodology, since ‘each has its own genealogy, disciplinary roots, instructions for use, and challenges in application’ (Padgett, 2008: 53). Dozens of specialized texts that grapple exclusively with the unique methodology and its nuances and internal debates are available. For example, a researcher choosing phenomenology might want to be familiar with the writings of Husserl, Heidegger, van Manen, Moustakas, and Giorgi, among others. Second, in addition to conceptual or technical discussions of the methodology, we recommend immersing yourself in research exemplars written by experienced practitioners of the methodology. Third, even within a particular methodology, you may want to identify your epistemological orientation. For example, if you select grounded theory, you may feel more aligned with Glaser and Strauss’ (2000) positivist tradition or with Charmaz's (2006) constructionist tradition. In short, starting with a comparative approach is likely to lead you to explore the philosophical and methods threads that will bring harmony to your design.

The Methodologies Exploration Approach

Related to the methodological comparison approach is the methodological exploration approach. We offer this as a distinct passenger car merely because there are so many qualitative methodologies to choose from. Thus, starting with a small number of pre-selected traditions espoused in the methodological comparison approach may be too restrictive.

For example, you might be interested in arts-based or arts-informed strategies (see Casey and Murray, Chapter 31, this *Handbook*). These are rarely covered in basic comparative readings; nonetheless, they open an-

other universe of methodologies. You may be interested in historiography and wish to borrow from research traditions well established in history or other humanities. It is not surprising that Padgett (2008), a social worker, included action research on her list of comparative choices, given the profession's applied work. However, in other disciplines, the whole family of participatory, community-based, and action-oriented strategies might be less common. Another possible avenue of exploration is the entire family of narrative approaches, such as oral history, narrative inquiry, or the biographical narrative interpretative method (see, e.g., Henwood, 2019; Rau and Coetzee, Chapter 42, this *Handbook*). Others may know they want to explore methodological traditions rooted in power dynamics and critical theory, such as feminist approaches (see Hawkey and Ussher, Chapter 11, this *Handbook*), critical race and/or queer theory (see Milani and Borba, Chapter 12, this *Handbook*), or liberation approaches traceable to Paulo Freire's (1968) *Pedagogy of the oppressed*.

However, we argue that this eclectic reading should eventually lead to more focused decisions in which you settle on a specific approach that is compatible with your philosophical, methodological, and methods plan of action. In other words, whichever methodologies you seek to explore, we suggest that you run them through the Ferris wheel.

The Methods Approach

If we were to venture a guess about the most common entry point for novice researchers, it would be the methods approach. Arguably, it is also the most hazardous among all the entry passenger cars. This is because it reflects the lowest common denominator among research designs. A given method might be associated with dozens of different methodologies. Starting with a method is a bit like saying you wish to write a paragraph by proposing the use of a single letter of the alphabet. It may be a helpful building block but isn't sufficient in isolation.

Briefly, we identify four common *method* entry points. They comprise identifying a research location, a study population, a topic area, or a method for collecting evidence. For example, you may want to study a specific program or place such as a methadone clinic or a senior center. You may know you wish to study a population of interest such as foster-care children or refugees. You may have identified a general problem area such as sex trafficking, prison reform, or migration experiences. Finally, you may be certain about doing ‘interviews’ or ‘focus groups’ but not clear on what is next. In short, you have a rough starting point but not much else. An

even larger dilemma exists when a student arrives having already conducted ‘qualitative interviews'. In this case, the students are usually seeking advice on how to ‘code’ or, perhaps, how to do thematic analysis.

Notice that the basic problem with starting your ride on this passenger car is that only a single concrete step in a complex process has been identified. However, that step is unmoored from the rest of the research process. Depending on your exposure to research generally, or to qualitative methodologies more specifically, there may be dozens of possible next steps.

The Potpourri Approach

Another common entry approach is revealed in a question like this: ‘I want to combine *x* and *y* (and, sometimes, *z*, and more) in my study; how can I do that?’ Here, *x* and *y* could represent interview and participant observation, thematic coding and narrative analysis, or ethnography and community-based participatory research. Researchers who start the choosing process with this potpourri approach come from different places. Some may have learned about different methodologies or methods and like them all. Others may have been experienced in one methodology and want to incorporate additional elements in the research design. Still others may have conducted preliminary research and wish to expand the process.

The potpourri approach has become quite common among qualitative researchers. Scholars have explicitly argued that it is an intuitive way of doing research (Creswell and Clark, 2018; Johnson et al., 2000; Padgett, 2016). Just as ordinary human beings use multiple sensorial organs to capture everyday happenings, or as professionals draw upon different sources of information to go about their practices, researchers incorporate ‘multiple ways of seeing and hearing’ (Greene, 2007: 20) to make better sense of the world. Intuitive as it appears, the potpourri approach can complicate the process, and researchers may find themselves considering several interrelated issues.

First, for what purpose might researchers want to mix things? Many blend multiple methods or methodologies in one study in order to diversify perspectives, enrich analysis (see the Chapters in Part V, this *Handbook*), or demonstrate rigor. For example, regarding blending methods, Fereday and Muir-Cochrane (2006) used hybrid thematic analysis, combining data-driven inductive coding with theory-driven deductive coding, to study nursing practices (see also Swain, 2018). Wilson and Hutchinson (1991) combined Heideggerian hermeneutics’ concerns about everyday meaning-making with grounded theory's exploration of social-psychological

processes in their study of caregiving experiences (see also Annells, 2006). Researchers may also engage with multiple methodologies (see the Chapters in Parts V and VII, this *Handbook*) in studying a social phenomenon to explicitly show how truth claims may be variously constructed by people with different epistemological orientations. For example, Honan et al. (2000) compared three distinct analytical approaches – discourse coordination, post-structuralist analysis, and ethnomethodology –to the same ethnographic case material. They showed how these different approaches radically influenced what could be found in and said about the material – in their case, the subjectivities of a 12-year-old schoolgirl, ‘Hannah'. No matter what prior experience has led you to this potpourri passenger car, it is important to think through the purpose of a potpourri design before exiting the choosing wheel.

Second, at what level(s) does the potpourri occur in a single study? Our Ferris wheel model suggests that choosing a design is a comprehensive process involving a range of considerations. In this holistic cycle, potpourri mixing can occur at several locations. Most commonly, mixing happens at the methods level – that is, combining multiple methods within one methodological paradigm (Bazeley, 2018; see Bazeley, Chapter 36, this *Handbook*). For example, Yin (2014) introduces case study (see Tight, Chapter 24, this *Handbook*) as an inherently mixed-methods methodology. The complexity of the case at issue – that is, its own multidimensionality and its dynamic embeddedness within contexts – demands multiple modes of inquiry. Ethnography is another example of mixing methods within an umbrella methodology. In an ethnographic design, researchers may use participant observation, interview, survey, and a variety of other tools to collect evidence, as well as various coding and non-coding strategies for analysis. Some methodologies (e.g. ethnomethodology; see Hoey, Chapter 30, this *Handbook*) may be relatively less open to incorporating multiple methods.

Potpourri mixing may also happen in the form of cross-paradigm combining at the methodology level (Padgett, 2012). The combination of phenomenology and grounded theory in Wilson and Hutchinson's (1991) study is a typical example (see Swanson-Kauffman, 1986 for the combination of grounded theory, ethnography, and phenomenology). Cross-paradigm mixing is not without controversy. Some argue that blurring the distinctions between various methodologies may introduce incongruities between paradigm and methods, or ‘method slurring’ (Baker et al., 1992), resulting in each methodology losing its integrity and rigor (Lincoln and Guba, 2000; Morse, 1991). Others contend that rigid adherence to ‘methodological purity’ may be unnecessary and unrealistic, given that paradigmatic distinctions are as constructed and modifiable as the knowledge they produce (Johnson et al., 2000; Layder, 1993).

The Mixed-Methods or Multi-Methods Approach

Related to potpourri mixing is the mixed-methods, or multi-methods, approach (see Hesse-Biber, Chapter 37, this *Handbook*; Cheek and Morse, Chapter 38, this *Handbook*). Researchers who board the Ferris wheel through this passenger car are often grappling with the long-standing qualitative vs quantitative debate in social science. They are interested in participating in discussions about ways of integrating the two, particularly about combining numeric and non-numeric forms of evidence in their research designs. Recently, these discussions have fallen under the umbrella phrase ‘mixed-methods research'. We distinguish this approach from the potpourri mixing approach, which focuses exclusively on combining qualitative methods or methodologies in the research design. Mixed-methods research discussions often start with justifying why, when, and in what ways qualitative methods are appropriate in a research project. In academic disciplines where statistics-driven, quantitative methodologies dominate, mixed methods are a common point through which researchers first enter into the field of qualitative research.

Although the practice of mixing quantitative and qualitative approaches in a study has long existed in social research, it was not until the late 1980s that scholars began treating it as a standalone methodology with its own philosophical paradigm(s) and operational procedures (Johnson et al., 2007; Tashakkori and Teddlie, 2003; see also the Chapters in Part V, this *Handbook*). Despite variations in the definition of ‘mixed-methods’ along its evolution, it highlights the collection and analysis of *both* qualitative and quantitative data, as well as the *integration* of the two forms of data and their results (Creswell and Clark, 2018: 5). Advocates for mixed-methods research voice several justifications for it: the need to further make sense of the numerical results, the need for preliminary exploration before large-scale application of instruments, the possibility of diversifying understandings of one case from multiple data points, the benefit of additional publications from one study, and so forth. All of these justifications rest upon the basic assumption that qualitative methods and quantitative methods have their distinct strengths and weaknesses and that when used alone, neither sufficiently explains this complex world. Thus, integrating both in one study helps researchers simultaneously achieve depth of understanding and generalizability. If you accept our Ferris wheel model, we invite you to pause and think about how the model would operate in a mixed-methods world. Qualitative and quantitative approaches are grounded in quite different philosophical orientations (post-/positivism vs interpretivism/constructionism). It is reasonable to ask how compatible their mixture can be.

This question may lead to a set of concerns similar to those associated with the potpourri approach – that

is, for what purposes and in what ways does the mixture happen and to what effects? Controversies with the validity of mixed-methods research have centered around the ‘paradigm debate’ (Creswell and Clark, 2018). While some argue mixed-methods research is untenable due to the incommensurability between the philosophical paradigms underlying the different methods, others call for abandoning the ‘forced-choice dichotomy’ (Creswell and Clark, 2018: 39) between post-positivism and constructionism. These researchers argue for prioritizing the role of research questions in guiding research designs. Proponents of mixed-methods research have invoked pragmatism as the philosophical paradigm for this methodology, arguing that research topics and questions, rather than commitments to any particular methodological tradition, should direct the methodological choices – that is, they adopt an eclectic and pluralistic view of methodologies oriented towards ‘what works’ (Feilzer, 2010; Johnson and Onwuegbuzie, 2004).

Intuitive and naturalistic as it seems, this general ‘pragmatic’ orientation may sidestep several important concerns. First, as we have argued, research questions do not come from thin air. It may be deceptive to imagine that researchers come up with questions that are ‘true’ to a given social phenomenon and are not influenced by their prior epistemological and methodological training. Second, such pragmatic views assume that different methodologies stand on equal footing, which may not be the case in an academic environment. Not noticing the differential privileging among epistemological orientations and methodologies may result in the marginalization of some ways of knowing and may devalue certain forms of knowledge. Here, we are not arguing against mixed-methods approaches; we are merely encouraging you to think through the Ferris wheel cycle during your choosing process.

Partly in response to challenges such as cross-paradigm incongruity in mixed methods, some researchers have proposed the term ‘multi-methods’ to define the kind of research in which different methods are used in parallel or sequence but not necessarily integrated (Anguera et al., 2018). This new terminology seeks to (1) go beyond the dichotomy of quantitative vs qualitative (the potpourri within qualitative research would become a kind of multi-methods approach), (2) broaden the possibility of having complementary methodologies addressing different questions under an overall research goal, and (3) better engage with ‘dialectical pluralism’ –by not insisting on the integration of methods – that reflexively attends to the different kinds of realities and their intersections as revealed by the different methodologies in one study (Anguera et al., 2018; Greene, 2015; Johnson, 2012). Compared to mixed methods, the multi-methods approach more explicitly urges us to think through the distinct philosophical assumptions underlying different methodologies, the ways in which findings from these methodologies may complement or contrast with one other, as well as the potential rea-

sons for and effects of such differences. Such considerations are consistent with our Ferris wheel model of choosing a design.

Conclusion

In this chapter, we were tasked with offering advice in choosing a research design. As a discrete step in the process of doing qualitative research, this isn't a topic which often receives direct attention. We argue that there are many ways to begin your process of selection.

As a means of conceptualizing our recommendations, we offer the model of a Ferris wheel as a dynamic cyclical image. Each potential researcher will begin their journey in their own passenger car; nonetheless, we argue that each should take a grand tour of the ride before finishing the process. We offer seven starting approaches: the research question approach, the philosophical thread approach, the methodological comparison approach, the methodological exploration approach, the methods approach, the potpourri approach, and the mixed- (or multi-) methods approach.

In brief, the research question approach acknowledges that beginners are frequently told to start with their *research question*, which will miraculously lead to their methodology. We maintain that for qualitative researchers, formulating a research question is often a more iterative process of moving back and forth between the problem area and question formulation as the researcher's methodology takes shape. The *philosophical thread* starts in the realm of the philosophy of science with an understanding of ontological or epistemological traditions, which can eventually suggest a concrete and practical design. The most common starting approach recommended by other scholars is the *methodological comparison*. These authors offer side-by-side comparative views of methodologies, helping the researcher understand and envision different approaches to research design. Expanding on this is the *methodological exploration approach*, which does not start with a restricted set of options but opens up the possibility of less commonly used methodologies. Arguably, the *methods approach* is the most challenging one, because the researcher is starting with the smallest common denominator in the overall research design process. This approach requires filling in a great deal of additional detail. The *potpourri approach* and the *mixed-methods approach* have become increasingly popular. We argue that scholars starting with these passenger cars should consider the purposes and levels of the mixture, check the methodological integrity or the cross-paradigm congruity, as well as stay reflexive of the implicit

differential privileging among various epistemological-methodological traditions.

Importantly, we have argued that none of these passenger cars is sufficient alone. No matter where you start, your personal journey requires grappling with epistemology (and maybe ontology), axiology, theory, methodology, and methods to bring the project into balance. Core features of any qualitative research project are iterative processes that require ongoing reflexivity. We posit that selecting a design is no exception.

We hope that by offering a variety of entry passenger cars, we have legitimized a number of different starting points that will be helpful to both the novice researcher as well as the more experienced practitioner.

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