TEACHING QUALITATIVE METHODS IN EVALUATION: ISSUES AND SOLUTIONS

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Abstract:
This paper has arisen from the observation of nine Qualitative Methods (QM) courses in both Australia and England over a period of ten years. Courses were observed across a number of disciplines and it was found that there were common issues that arose across all locations and course types. These are described, as well as associated literature, before indicating how each issue has been tackled by the QM course in the Masters of Assessment and Evaluation course at the University of Melbourne's Centre for Program Evaluation.

Particular problems arose concerning: how to deal with the complex nature of QM; the question of whether to concentrate on theory or practice; what to include in the curriculum; and how to assess the subject.

Introduction

My interest in the teaching of Qualitative Methods (QM) arose as a result of needing to take a class of QM students within Post-Graduate courses in Evaluation at the University of Melbourne. As my teaching experience had originally been in secondary school Geography and French, this situation meant I had to face a different teaching 'method' about which, at the time, I knew little. Consequently, I went to the library to find information about: what particular course elements would have to considered; how to devise an appropriate curriculum; and what issues might be faced. However, to my dismay, there was no such assistance available for, while at the beginning of the '90s there were increasing numbers of books dealing with qualitative data management, there was virtually nothing written, at that time, about teaching QM, except for a few introspective reflections by individuals (eg Janesick, 1983, Nyden, 1991, Snyder 1995).

Qualitative Methods: A Relatively New Discipline

This lack of information, perhaps, should not have been surprising for, in comparison with other disciplines, the teaching of QM across applied social sciences is, relatively speaking, in its infancy. However, recognition of QM has grown particularly rapidly over the last thirty years and is a subject now taught across disciplines. Teaching QM began in social sciences such as Anthropology, Sociology, Evaluation and Education in the last decade been taken up by traditionally more 'scientific' disciplines such as Communications, Psychology and Medicine.

As a result, there has been no long-term teaching tradition for lecturers to 'hook into', no serious review of QM teaching approaches and, therefore, no substantial body of literature from which to draw for guidance. Consequently, I decided to undertake a participant observation study to find out what is going on in qualitative methods classrooms. I became a 'student' in nine courses both in Australia and in England and attended all lectures and tutorials over more than a ten year period.

Characteristics of Cases Observed

The main aim when choosing courses to visit was to ensure maximum variation. Therefore, I selected courses that reflected differences in: location; course length; gender and age of staff; degree ofstaff experience; student type and level; and home discipline (Table 1).

Table 1; Characteristics of Courses Observed

Course Location	Course Length	Home Discipline	Gender of Lecturer(s)	Experience in QM Lecturing	Undergrad Or Postgrad	No in Class
(Australia)	Semester	Anthropology	M	A Few Years	UG & PG	94
(Australia)	Semester	Education	M	Many Years	PG	35
(Australia)	Semester	Evaluation	F	Many Years	PG	25
(UK)	Year	Sociology	M	A Few Years	UG	50
(UK)	Year	Sociology of Education	M	Many Years	PG	15
(Australia)	7 weeks	Psychology	F	First Year of Teaching	UG	50
(Australia)	Semester	Criminology	F/M	A Few Years	UG & PG	90
(Australia)	Semester	Communications	F	First Time with this Course	UG	25
(Australia)	Semester	Nursing	M/F	Considerable/ A Few Years	UG	105

Some of the lecturers I knew beforehand while others became participants through snowball sampling.

Specifically, courses:

- were located in the disciplines of Anthropology, Education, Evaluation, Sociology, Sociology of Education, Psychology, Criminology, Communications and Nursing;
- lasted from seven weeks to a year;
- were taught by eleven lecturers of different gender and age and who ranged from novice to experienced;
- comprised both undergraduate, post-graduate and mixed level courses;
- ranged from expecting a full student project to not requiring any practice at all.

Issues That Arose

It soon became clear that each course was faced with a number of issues. The remainder of this paper concentrates on those problems which arose across all courses: be it within a course taught in England by an experienced male lecturer to Sociology students-- or in Australia taught by a novice female lecturer to Psychology students.

Constrained by the length of a conference paper, only major issues are to be presented here[1] They are considered in the light of associated literature before demonstrating how the Centre for Program Evaluation (CPE) at the University of Melbourne has tried to deal with each issue within the subject *Qualitative Methods in Evaluation* (a component of the Master of Assessment and Evaluation course).

Issue 1: What Exactly are Qualitative Research Methods?

The term 'qualitative research methods' is problematic and presents the first issue for teachers of QM. Denzin and Lincoln (1994: 1) say that qualitative research comprises a *"complex, interconnected family of terms, concepts and assumptions."* This 'complexity' and 'contradiction' can be seen throughout the qualitative methodology literature. For instance, Jacob (1987) presented a five-fold division of qualitative approaches: ecological psychology; holistic ethnography, ethnography of communication, cognitive anthropology; and symbolic interactionism. Campbell (1988: 59), on the other hand went on to provide a whole host of other labels such as 'qualitative sociology', 'phenomenology', 'ethnography', 'ethnomethodology', or 'grounded theory'.

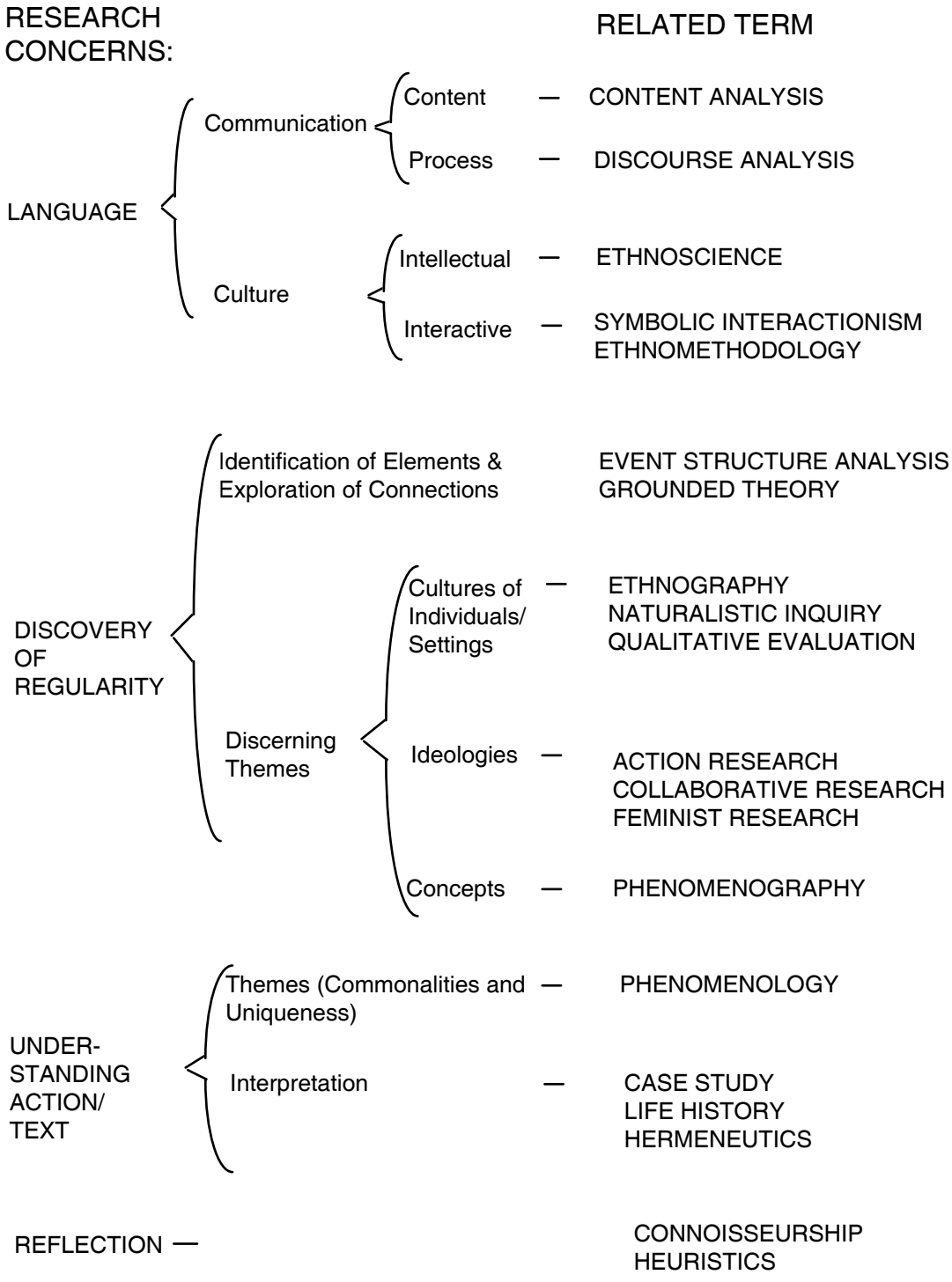
All courses attended struggled with this issue and with the extent they would concentrate on trying to understand the evolution and fundamental basis of the subject and the various approaches within it.

How Has the CPE Responded to Issue 1?

The CPE has found it useful to base a small part of the introduction of the course on the work of the late Renata Tesch (1990) who claimed that QM are derived from twenty-seven different schools of thought. Using Tesch's ideas, qualitative approaches can be grouped into those associated with; interests in language, the discovery of regular patterns, the understanding of text, or reflection (Figure 1). It is easy then to demonstrate how qualitative evaluation (which mainly tries to identify themes) sits in the schema (Fig 1) as well as other approaches which can be used within the evaluation discipline [such as action research for Interactive evaluations (Owen, 2006) or the use of Case Study to gain a deeper understanding of programs in action].

[1] There are many other issues which appear in:
Hurworth, R. (2008) *Teaching Qualitative Research: Cases and Issues*. Amsterdam: Sense Publishers.

Figure 1: A Classification of Types of Qualitative Research (after Tesch, 1990) Used Within the Centre for Program Evaluation, University of Melbourne



Issue 2: Theory, Practice or Both?

Next it became apparent that determining the ratio of theory to practice in qualitative courses is a perennial and ubiquitous issue. Authors such as Rist (1983), Gross Davis (1986), Lareau (1987), Bull (1990), Mariano (1990), Schmid (1992) and Wolcott (1994, 1997b) all enter discussion about whether there should be an emphasis on theory or practice when teaching QM or whether there should be an attempt to incorporate both elements simultaneously.

There was also an associated issue that theory meant different things to different lecturers Some people used it as an 'umbrella' term to mean everything that was not practice. Others considered it was associated with: overarching approaches (such as those depicted in Fig. 1); the history of Qualitative approaches; ideas behind methods; or specific techniques (where a number of steps are outlined which, if carried out, ought to lead to a desired end).

Whatever the interpretation of the word 'theory', all lecturers observed believed that the subject needs to be based on practical application and that 'you can really only learn it by doing'. Therefore in some courses (Anthropology, Education, Communications and Sociology) student practice formed the core around which everything else revolved.

However, others considered that to some extent: "*Methods without theory is weak and indefensible and that theory without method is abstract and aimless. The two belong together and need to be taught together"* (Michrina and Richards, 1996:1). But as Table 1 indicates, most courses were semester-long or less. Consequently, faced with such a constraint, lecturers were uncertain about theory-practice ratios. They questioned how they could manage both aspects within limited time.

So, the only courses observed which had the luxury of being able to consider theory at some length before moving into practical considerations were year-long British courses. Both lecturers involved felt it was important to present a thorough study of origins and historical background to qualitative approaches, illustrated with material from classic QM texts. This is consistent with findings of Guppy and Arai who reported:

> *What is strikingly <u>not</u> offered in the research methods curriculum in the USA, Canada and Australia is any sustained discussion of issues in the philosophy of science. This is in sharp contrast with England where huge proportions of time are devoted to this and other epistemological issues* (Guppy & Arai, 1994: 228).

Not surprisingly for most other courses observed there had to be some kind of compromise, such as reducing one aspect or the other, in order to be manageable for both staff and students. As Lofland and Lofland (1983) admitted, if time was limited they would turn more to theory:

> *Frankly, if we only had a single semester, we'd be tempted to make our lives easier by eliminating the project requirement and simply teaching about fieldwork!* (Lofland & Lofland, 1983: 183).

Meanwhile, the Communication QM lecturer observed decided to concentrate on practice because:

> *My overriding view is that it would have been better to have had some kind of theoretical perspective on what we were doing but we never had time. Theory went out in favour of practice, given the type of students I have in front of me.*

Others, though tried to incorporate equal amounts of both theory and practice by introducing practical exercises into the classroom rather than expect a project to be undertaken in students' own time. However, the Anthropology and Education courses were ambitious by attempting to have both practice and theory being tackled simultaneously. This turned out to be problematic as students frequently needed to know things out in the field before they had been taught in the classroom.

How Has the CPE Responded to Issue 2?

The Master of Assessment and Evaluation course tends to attract professionals who are already engaged in evaluation activity. The demand, therefore, in the Qualitative Methods subject is for knowledge about cutting edge methods as well as practice of skills rather than spend a great deal of time on philosophical underpinnings. So students are given plenty of hands-on training and practical exercises rather than spending too long on philosophy of science bases. The CPE, therefore, tends to talk more about ideas behind methods and techniques and how particular approaches can answer particular evaluation questions-- rather than spend time on all the different methodological approaches.

Nevertheless, not wanting to 'short-change' students, the matter of choosing approaches is more likely to be discussed in other evaluation subjects offered in the course. For instance,: action research would be tackled when talking about interactive forms of evaluation; case study might be considered in monitoring types of evaluation; or ethnography might be considered within a long-term study of an intervention. Students to would also read to fill in some background eg. Snape & Spence's chapter *The Foundations of Qualitative Research* (in Ritchie & Lewis, 2003).

Issue 3: What Makes for a Good QM Curriculum?

In the literature, the matter of QM Curriculum design has not been dealt with as an issue (except Mariano, 1990). Often authors just list what they include (often reflecting the fieldwork process.) For example, Bogdan (1983) says that his course sessions were organised around such topics as 'getting in', 'establishing rapport, 'key informants, 'fieldwork tactics. emerging themes, leaving the field, and data analysis (Bogdan, 1983;172). Otherwise, authors do not indicate how choices have been made and do not make any judgement on final decisions.

Within the courses observed, several lecturers stated that organising a QM curriculum was a difficult and uncertain matter because a whole range of factors had to be taken into account including each: lecturer's thoughts about QM and theory-practice relationships (Issue 2); the lecturer's qualitative orientation and knowledge; and contextual factors such as length of sessions, length of course, methodological approach being followed, home discipline, amount of student prior knowledge and the complex nature of the subject.

However, an examination of sites visited revealed some interesting patterns. Even with the variety of underlying conditions, emphases and decision-making processes, there were certain common topics covered and some which were commonly neglected. Common points noted about content were that lecturers:

- began with a general overview
- examined particular methodologies and paradigms
- spent the majority of time dealing with data collection
- took up a quarter to a third of course time with participant observation and interviewing theory and associated exercises. This meant that these topics were taught at the expense of others
- introduced few practical exercises to apply theory concerning analysis and less popular topics
- neglected certain data collection techniques such as examination of documents and the use of visual images as data
- limited teaching of critical areas such as analysis
- taught little about computer-assisted data analysis
- gave little or no time to topics which all would say are integral to qualitative research (such as sampling, ethics, analysis, rigour and writing)
- left analysis and writing till the end when this may be too late

and

- gave little consideration to how QM can be used effectively when using mixed-method (quantitative and qualitative) approaches.

Furthermore, some areas were omitted because many lecturers were often: not abreast of current QM literature; untrained in QM; inexperienced in regard to certain topics (such as the use of photos as data, computer analysis, focus groups); or were uncertain about particular aspects of QM such as issues of rigour (e.g. triangulation, audit trails etc). Thus, it was not surprising that several were uncertain about or did not teach some important content.

How Has the CPE Responded to Issue 3?

In relation to course design the CPE has taken into consideration:

- the length of the course
- core aspects of qualitative methodologies and methods
- the demand from students for a practically-oriented QM course

- cutting edge techniques being used in current evaluation practice
- omissions in courses just noted
- recognition that topics such as analysis and writing are often poorly taught.

As a result, the Evaluation QM subject incorporates both traditional and newer aspects of QM. It also tries to provide a balance between data collection, analysis and reporting and to concentrate on analysis more than other courses appear to do.

As a semester usually contains twelve weeks long the following program has been devised to meet the above criteria and constraints:

Core Elements (Taught by All Courses Observed)
Session 1: An Overview of Methodologies and Methods
Session 2: Participant Observation
Session 3: Interviewing

More Unsual/Cutting Edge Topic (Often Not Taught by Others)
Session 4 Focus Groups
Session 5 Most Significant Change Technique (Story telling)
Session 6 Document Analysis
Session 7 The Visual Medium

Analysis (Often Glossed Over by Others)
Session 8 Computer/Hand Analysis Methods
Sessions 9-10 Preparation for Analysis for Assessment

End Topics
Session 11 Writing and Ethics
Session 12 Case Study (including Sampling)

Ending with Case Study might appear odd but actually it is a great topic for revising all sessions that have preceded it.

Issue 4: What Sort of Reading Should Students be Expected to Do?

As we noted above, lecturers in observed courses, often hoped that whatever theory was not covered or understood in class would be 'patched up' by reading. However, the degree to which reading was expected and what should be read varied greatly.

The courses that seemed to expect least reading were those that were technique-based. because: *"I do not believe they can learn such methods from textbooks, especially with ethnographic research. You learn it through doing it. So you have to do it rather than read about it* (Anthropology QM Lecturer). Others, however, expected considerable reading and integrated it totally into the theoretical side of the course and into assessment (Education and Sociology courses).

Meanwhile, other lecturers were uncertain about the amount of reading that should be expected and, in fact, some shied away from suggesting too much. Part of this decision was associated with the fact that many students were reported to be more 'concrete' rather than 'deep' thinkers (terms used by Piaget) and a belief that current students *"just don't read"* (Criminology QM lecturer). Therefore, the latter: *"decided not to use long reading lists as students see an 'avalanche' and are frightened off*."

It was also recognised by all lecturers that: *"no one book deals with the methods comprehensively"* and so *"the easiest thing to do was find a text that was related closely to our discipline*" Therefore there were different textbooks used for each course visited e.g.:

Communic'n: Lindlof T. R. & Taylor, B.C. (2002) *Qualitative Communication Research Methods* (2nd ed).
Criminology: Noaks, L. & Wincup, E. (2004) *Criminological Research: Understanding Qualitative Methods.*
Education Bogdan, R. & Biklen, S. K (2006) (6th ed.) *Qualitative Research for Education*
Nursing*:* Holloway, I. & Wheeler, S. (1996) *Qualitative Research for Nurses*.
Sociology: Marvasti, A. (2004) *Qualitative Research in Sociology*.

How Has the CPE Responded to Issue 4?

The QM course in evaluation recommends as its text Patton's 2002 edition of *Qualitative Research and Evaluation Methods*. Like those listed above this is discipline based. While it is a large and expensive book (as it is only available in hard back) Patton has a way with words that makes for easy reading. It is also highly practical being based on the authors' evaluation experiences. This is supplemented with about half a dozen other readings provided weekly according to the topic for the session.

In addition, by contrast to the Criminology lecturer mentioned earlier, the Centre provides a long reading list where there are many alternatives provided,so that students do not complain that; *'I've been to library but can't find anything on the list!*'. Even though the Education Resource Centre (University branch library) is the best stocked library in Victoria, as far as qualitative books are concerned, there are many students across the University studying QM-- so there will always be competition for volumes. Thus, there is need to suggest a range of volumes to meet the demand.

In addition, evaluation students come from every discipline one can imagine Currently they are from diverse fields such as: Medicine, International Development, Primary Industry, Finance, Law and Teaching. Of course those who are teaching may be interested in sub-disciplines that range from Music to Maths, or Chemistry to History. Therefore, besides a relevant general text for evaluation titles are provided that will cater for personal interests such as: Business, Health, The Arts, Family Research, Gender Issues, Geography, Gerontology, Information Systems, Leadership, Librarianship, Management, Market Research, Organisations, Psychology, Social Work, Theology and Tourism.

Issue 5: How Should a Course in Qualitative Methods Be Assessed?

The final issue that this paper addresses concerns assessment. For lecturers observed this was a particularly complex issue because there could be difficulties in integrating particular beliefs concerning QM generally and assessment in particular, as well as trying to reconcile ideas held about assessment and any imposed demands imposed by university regulations. Furthermore, there is little help from the literature as QM assessment is a matter that receives scant, if any, attention. There is silence on the whole matter and certainly no debate on potential alternative modes. So, in order to examine assessment comparatively, I have to rely entirely on what was observed in the courses visited .

For several courses there was a strong belief in students learning through practice and so it was expected that a major part of assessment would be a project carried out by students. In these cases the respective courses were presented as an integrated 'package' with projects pervasive through all teaching, tutorials and workshops. In the remaining courses assessment was seen as a somewhat separate exercise which either took up a particular section of the course, went on in the background or was not mentioned until the end.

Another variation was revealed through the number of assessment tasks required. This ranged from 1-5. Here are some assessment components which show the variety of tasks expected:

Anthropology: Research Proposal (15%), Literature Review (20%), Participation (5%), Individual Project (60%).
Education; Reflective Journal on learning QM (10%), Reports on Qualitative Studies Read (10%), A List of Guiding Principles for Naturalistic Inquiry (5%), An Individual Case Study (75%).
Sociology: Individual Project (to include a literature review, a detailed and critical discussion of the research process and a discussion of the findings) (50%), Examination (50%).
Psychology: Reflective Journal (20%), A Research Proposal (40%) Critique of one article (20%), Examination (20%)
Nursing: Take Home Examination (100%);

Most lecturers believed that the best form of assessment would be to undertake a project so that students 'could learn by doing'. However, due to a variety of reasons (such as time, class size and the nature of QM) some did not feel that this was possible. For example the Psychology lecturer felt that it was impossible to carry out fieldwork within a seven week course. Meanwhile, in the Nursing course it was thought that, with over a hundred students, it would result in too great a marking workload.

Then several courses expected a proposal/design either as a component of the assessment (Anthropology, Communication and Sociology of Education) or as the sole piece (Communications).

Another group of lecturers debated whether reading should be tied to assessment or not. The Communications lecturer thought that testing of text-book material was necessary in order to make students read. Meanwhile, four other courses (Nursing, Education, Psychology and Sociology of Education) had incorporated some form of reading as discreet pieces of assessment at some stage and expected critiques. However, two decided to abandon this exercise as they found the marking of over a hundred critiques too much.

Meanwhile, examinations were used as a form of assessment by four of the courses observed. Two of them (Psychology and Nursing) were theory only courses while three (Psychology, Communications and Sociology) used exams in conjunction with other forms of assessment. Only the Nursing course relied exclusively on an exam.

Some relied on examinations because of university regulations but other favoured an exam as it was felt that a series of essays or similar would be too time consuming for both students and staff. For instance, the Communications QM lecturer resorted to a twenty-item multiple-choice test that would be quick to mark—although her students were not pleased as they felt this did not show what had been learnt.

Overall, then, there were differing viewpoints about exams as a testing technique for QM. The Psychology lecturer, for instance, said that she would have preferred a project but stated that examinations had the advantage of being; *"so easy to develop--much easier than to think about students' fieldwork processes."* The Sociology of Education lecturer, however came down firmly on the side of projects:

> *As someone who assesses these courses, I put more store by what they do in projects than by what they do in the exam. Anyone can work out wonderful exams but it really shows if you have the skills or not when you do the project. Somebody who's good in exams and not at practical work can still do well but they won't achieve heights of excellence.*

Of the courses observed, only the QM course in Nursing introduced a take-home exam. This had been decided upon after trying a prior form of assessment that had involved both a comparison of a qualitative and quantitative journal article and a take-home exam. However, with about 100 students, this had taken a month to correct.

Views about the take-home exam were mixed. Some students liked it others found it daunting as they had not undertaken this type of assessment before and did not know what to expect. Those who had prior take-home exam experience said that students are under considerable pressure as; "*It has to be spot on and so, is very hard to do well."* The Sociology of Education lecturer was the only other person to have tried using this type of assessment. He had not found it a successful way of assessing QM students explaining:

We tried take-home exams and they were an absolute disaster. They were not the great revolution that everyone had argued about--they were actually about who could run the fastest to the library in order to get the qualitative books that related to the questions on the paper.

For most courses, though, assessment was very much in a state of flux or uncertainty, Many of the lecturers were dissatisfied with their assessment procedures. Indeed they had often tried other things formerly, changed them and were about to change things yet again. They were still wondering:

- Can QM be assessed properly without practical application?
- Are examinations an appropriate assessment tool for QM?
- Can QM be assessed and given a grade/mark if a project is expected?

So some of the major findings from the observations regarding were that:

- both lecturers and students agree that there should be some practical component
- research proposals can be a useful exercise to lay the basis for later projects and for submission writing
- examinations seem to be the least successful and least desired form of assessment, even though some lecturers seem to find them most efficient
- take-home exams allow students to mull over problems but exert considerable pressure to do well
- reading tasks can be valuable if integrated well.

How Has the CPE Responded to Issue 5?

Like other courses, CPE has tried various forms of assessment over time and has rejected the idea of theory-based essays or examinations. It is now widely recognised for its innovative approach to QM assessment because it involves real data and current evaluation practice. Thus, it is perceived to be relevant, topical and challenging.

Assessment attempts to simulate how evaluators operate in the workplace and this has meant a departure from more traditional approaches of assessment. But because it would be difficult to design and collect data for a personal project within the confines of the subject, students are asked to manage and report on recent evaluation data that has emanated from CPE projects (unless the student has a suitable amount of their own qualitative data in hand from a workplace project).

It is known within the qualitative arena that 'the human is the research instrument' and therefore integral to a whole project. This means that the person undertaking qualitative evaluation should design it, obtain ethics clearance, carry out the fieldwork, analyse the resulting data and write the report. However, the CPE cannot expect the student to do all this within the constraints of a 12-week course. So, project work is curtailed by removing the design and fieldwork aspects.

Consequently, in order to become familiar with a particular evaluation, students attend for a whole day during a weekend, receive information about the evaluation context of a from the commissioner, and are given typed-up focus groups or individual interviews transcripts, documents etc. They then work in small groups or individually to map out data (using Miles and Huberman style grids, 1994)-- in preparation for report writing. Marks are given for this data display (40%) and later for the report (40%) . The remaining marks are allocated to a reflective piece that discusses how the design has been executed and this has to demonstrate reading from the QM literature.

So, in the past few years students have extracted, reduced and displayed material for evaluation reports associated with evaluations of: an insurance training program for poorer families; an art exhibition created by those with mental illness; a Metropolitan Ambulance Service program that uses a video to train over 50s to resuscitate; a school's kitchen garden program; and GP training needs regarding genetics. The evaluation also feels more 'real' because students are often taken to evaluation sites e.g. an art gallery; a school's kitchen garden. Sometimes they also experience the program itself such as being given the insurance training or watching the video and learning to resuscitate just as program recipients had done.

Students seem to find the whole assessment experience satisfying and enjoyable.

Conclusion

Through an evaluation of QM courses using participant observation, it has been possible to determine a number of common issues including those associated with; the complexity of the subject; the theory/practice relationship; what makes for suitable reading; what constitutes an appropriate curriculum; and how to assess appropriately. Being privy to what is happening elsewhere, the CPE has been able to learn from others in order to provide a strong and well-respected QM course for evaluation students.

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