Assessing the FACTS: A Mnemonic for Teaching and Learning the Rapid Assessment of Rigor in Qualitative Research Studies

Mohamed El Hussein
*Mount Royal University, melhussein@mtroyal.ca*

Sonya L. Jakubec
*Mount Royal University, sjakubec@mtroyal.ca*

Joseph Osuji
*Mount Royal University, josuji@mtroyal.ca*

Follow this and additional works at: [http://nsuworks.nova.edu/tqr](http://nsuworks.nova.edu/tqr)

Part of the [Quantitative, Qualitative, Comparative, and Historical Methodologies Commons](http://nsuworks.nova.edu/tqr) and the [Social Statistics Commons](http://nsuworks.nova.edu/tqr)

**Recommended APA Citation**


This Teaching and Learning is brought to you for free and open access by the The Qualitative Report at NSUWorks. It has been accepted for inclusion in The Qualitative Report by an authorized administrator of NSUWorks. For more information, please contact [nsuworks@nova.edu](mailto:nsuworks@nova.edu).
Assessing the FACTS: A Mnemonic for Teaching and Learning the Rapid Assessment of Rigor in Qualitative Research Studies

Abstract
Teaching and learning research appraisal strategies is a challenge in undergraduate education and for practitioners alike. The appraisal of rigor in qualitative research papers is particularly complex and sophisticated work for many undergraduate research students and practitioners who want to develop their critical reading skills. The mnemonic strategy (The FACTS) explained in this paper is one pedagogical strategy for establishing a simplified approach to teaching and learning the appraisal of rigor in qualitative research. While not a comprehensive tool, the FACTS are a useful introduction to the complex challenge of qualitative research appraisal.

Keywords
Pedagogical Strategy, Mnemonic, Research Literacy, Qualitative Research, Research Appraisal

Creative Commons License
This work is licensed under a Creative Commons Attribution-Noncommercial-Share Alike 4.0 License.

Acknowledgements
The authors would like to thank Dr. Nancy Moules of the University of Calgary Faculty of Nursing. It was in her doctoral class, and with her encouragement, that this mnemonic was first developed by Dr. El Hussein.
Assessing the FACTS: A Mnemonic for Teaching and Learning the Rapid Assessment of Rigor in Qualitative Research Studies

Mohamed El Hussein, Sonya L. Jakubec, and Joseph Osuji
Mount Royal University, Calgary, Canada

Teaching and learning research appraisal strategies is a challenge in undergraduate education and for practitioners alike. The appraisal of rigor in qualitative research papers is particularly complex and sophisticated work for many undergraduate research students and practitioners who want to develop their critical reading skills. The mnemonic strategy (The FACTS) explained in this paper is one pedagogical strategy for establishing a simplified approach to teaching and learning the appraisal of rigor in qualitative research. While not a comprehensive tool, the FACTS are a useful introduction to the complex challenge of qualitative research appraisal. Keywords: Pedagogical Strategy, Mnemonic, Research Literacy, Qualitative Research, Research Appraisal

Research literacy is an essential competency for nursing practice (Jakubec & Astle, 2013) and consists of the ability to locate, understand, and critically evaluate evidence for application in practice – a topic distinct from research capacity which is the ability to conduct research (Jakubec, 2015). Assessing rigor in qualitative research is an important, but challenging, research literacy activity for those in nursing and other health and community practice fields. For nursing students evaluating qualitative research studies and articles can be a challenge with students often mistakenly applying quantitative evaluation techniques to qualitative studies (Locke, Silverman, & Spriduso, 2010).

The purpose, goals and strategies of qualitative research are distinct from quantitative studies; being exploratory rather than explanatory and essentially interested in understanding how people make sense of their lives or experiences and how these experiences are organized or constructed. Qualitative research, thus, becomes a particularly appropriate for the discipline and practice of nursing (Munhall, 2012), and qualitative research literacy requires knowledge and skills for the accurate appraisal of rigor of a study.

There is no one process of ensuring rigor or trustworthiness appropriate for all qualitative studies, but generally the goal of rigor is to accurately represent study participants experiences or circumstances. Several complex frameworks for the appraisal of rigor have been developed over the years (Ryan-Nicols & Will, 2009; Shenton, 2004). While not a comprehensive appraisal, the mnemonic we developed provides a rapid and basic approach to the assessment of the quality of qualitative research studies. In this paper we describe the mnemonic FACTS (Fittingness, Auditability, Credibility, Trustworthiness and Saturation) as a teaching-learning innovation to support appraisal of rigor in qualitative research literacy.

(F)ittingness (also termed transferability) is the ability of the researcher to demonstrate that the findings have meaning to others in similar situations (Beck, 1993). Transferability is dependent on the degree of similarity between two contexts (Koch, 1994). It is not considered the responsibility of the qualitative researcher to provide an “index of transferability,” rather the researcher should assume the responsibility of exhibiting, through data and analysis, the transferability in their research paper. Sandelowski (1986) further elaborated that “a study meets the criterion of fittingness when its findings can [fit] into contexts outside the study situation and when its audience views its findings as meaningful and applicable in terms of their own experiences” (p. 32). This fit may also be considered part of the purpose or relevance of the research – also evaluated as part of appraisal of rigor.
Auditability is the systematic record keeping of all methodological decisions, such as a record of the sources of data, sampling, decisions, and analytical procedures and their implementation. This is sometimes referred to as confirmability. Guba and Lincoln (1989) termed this record an “audit trail” (p. 243). An audit trail shows the confirmability of research findings through “a recording of activities over time that another individual can follow… the objective is to illustrate as clearly as possible the evidence and thought processes that led to the conclusions” (Speziale & Carpenter, 2007, p. 49). The audit trail should be sufficiently detailed to make it possible for other researchers to repeat the same enquiry in the same setting should they want to (Beck, 1993).

Credibility relates to how vivid and faithful the description of the phenomenon is (Beck, 1993), that is the probability that the study findings will ring true to other people in similar circumstances. Guba and Lincoln (1989) suggest that a study is credible when it presents such a vivid and faithful description that people who had that experience would immediately recognize it as their own. Thorne (2000) observed that this process involves “immersing oneself in data, engaging with data reflexively, and generating rich descriptions that will enlighten the reader to the deeper essential structures underlying the human experience” (p. 69).

Trustworthiness is a concept in qualitative research that encompasses all of the above mentioned steps and refers to the degree of confidence one can have in the data. This assessment addresses the quality or credibility of the data and/or the research paper as a whole. The believability of the overall findings is another aspect of trustworthiness – confidence in the truth in the findings. In this ways both researcher and data credibility are evaluated, along with the dependability and confirmability of the data and overall findings. Taken together these aspects of the evaluation or rigor demand appraisal that the necessary steps have been taken and thoroughly described in a way to ensure that the study procedures meet high standards and that the results can be trusted.

Saturation: Data saturation in qualitative research occurs when the researcher is no longer hearing or seeing new information – that there is sufficient data. This can also be referred to as informational redundancy. The example of a soaked sponge that can’t hold more water provides one illustration of saturation, analogizing that adding more data would be of no further consequence to the analysis.

We believe that the research appraisal mnemonic FACTS will support teaching and learning of research literacy and specific appraisal of rigor in qualitative studies. Beyond the teaching-learning benefits, broader consistency in evaluation and literacy of qualitative research may expand the scope of dissemination and utilization of findings in nursing practice. Both the application of the mnemonic and outcomes related to research literacy and utilization will be important next steps for this teaching and learning innovation.

References


**Author Note**

Mohamed Toufic El Hussein RN, PhD, Associate Professor with the School of Nursing and Midwifery in the Faculty of Health, Community and Education at Mount Royal University. Correspondence regarding this article can be addressed directly to: Mohamed El Hussein at, 4825 Mount Royal Gate S W, Calgary, AB, T3E 6K6, Canada; Phone: (403) 440-8633; Fax: (403) 440-6203; E-mail: melhussein@mtroyal.ca.

Sonya L. Jakubec is a PhD candidate with the University of Calgary and an Associate Professor with the School of Nursing and Midwifery in the Faculty of Health, Community and Education at Mount Royal University. 4825 Mount Royal Gate SW, Calgary, AB, T3E 6K6, Canada; E-mail: sjakubec@mtroyal.ca.

Joseph Osuji C, RN, PhD, Associate Professor, School of Nursing, Faculty of Health and Community Studies, Mount Royal University. 4825 Mount Royal Gate SW, Calgary, AB, T3E 6K6, Canada E-mail: josuji@mtroyal.ca.

Copyright 2015: Mohamed El Hussein, Sonya L. Jakubec, Joseph Osuji, and Nova Southeastern University.

**Acknowledgement**

The authors would like to thank Dr. Nancy Moules of the University of Calgary Faculty of Nursing. It was in her doctoral class, and with her encouragement, that this mnemonic was first developed by Dr. El Hussein.

**Article Citation**