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Qualitative Research as a Hero's Journey: Six Archetypes to Draw on

Vanessa M. Villate

Lamar University, vanessa.villatesikes@lamar.edu

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Abstract

Is the research process similar to a hero's journey? Just as a hero draws on different archetypes during the journey, a researcher moves through phases and must draw upon different strengths. In this article, the six archetypes that Pearson (1998) links to the hero's journey are described. Then, each phase of a qualitative research study is described, followed by reflection on which of Pearson's six archetypes were active. Discussion focuses on how other archetypes could have been helpful in each phase, as well as how other researchers could use this process of archetypal reflectivity to make their work more authentic and intentional.

Keywords

Qualitative Research, Archetypes, Archetypal Reflectivity, Intentionality in Research

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Qualitative Research as a Hero's Journey: Six Archetypes to Draw on

Vanessa M. Villate
Lamar University, Beaumont, TX, USA

Is the research process similar to a hero's journey? Just as a hero draws on different archetypes during the journey, a researcher moves through phases and must draw upon different strengths. In this article, the six archetypes that Pearson (1998) links to the hero's journey are described. Then, each phase of a qualitative research study is described, followed by reflection on which of Pearson's six archetypes were active. Discussion focuses on how other archetypes could have been helpful in each phase, as well as how other researchers could use this process of archetypal reflectivity to make their work more authentic and intentional. Keywords: Qualitative Research, Archetypes, Archetypal Reflectivity, Intentionality in Research

Is a researcher a hero? According to Pearson (1998), heroes take journeys, confront dragons, and discover treasures. For the researcher, the journey is the research process, the dragons are the research problems or questions, and their treasure is new insights. Like a hero, the researcher may feel alone during the "quest" (Pearson, 1998, p. 3). Through the process, though, both the hero and the researcher seek answers that ultimately contribute to a collective transformation.

By looking at the research process through the lens of a hero's journey, I believe that researchers could be more reflective, intentional, and authentic in their work. Indeed, scholars who write about the research process advocate for reflexivity (Creswell, 2007), for making the process deliberate (Booth, Colomb, & Williams, 1995), and for matching the type of research to the researcher's personality and skills (Merriam, 1998). As heroes make their way through their journey, they are often viewed as drawing upon different archetypes (Campbell, 1970; Pearson, 1998; Mayes, 2010). Carl Jung, a Swiss psychiatrist, pioneered work with archetypes in the early 20th century. He defined archetypes as "deep and abiding patterns in the human psyche that remain powerful and present over time" (Pearson, 1998, p. x). Pearson advocates for the use of archetypes as a way to help us decode our own inner workings and meet the challenges of contemporary life.

Mayes (1999) has developed a process of deep reflection that he calls archetypal reflectivity. It is based upon the idea of people consciously considering the archetypes that are active in their lives, as well as those that are not but that could be helpful, in order to transform their work. Mayes uses this technique with teachers through workshops and graduate classes, and based on the process, teachers report increased reflection and intentionality in their work (Mayes, 2005). I believe that the ideas of archetypal reflectivity can also be applied to any type of work, and can be particularly useful for considering the research process. As applied to the research process, archetypal reflectivity provides a novel structure for researchers to consider ways of being more reflective and intentional, thereby meeting the calls of research scholars. I believe that

thinking in terms of archetypes and archetypal reflectivity is an interesting way to delve deeper into the thoughts behind a given process. Among the work that academics undertake, I find that the research process is one of the most complex and nuanced processes and very suitable for being considered in this way.

In this article, I explain the six archetypes that Pearson (1998) links to the hero's journey. Then, using archetypal reflectivity, I describe how I embodied those archetypes during a recent study. Finally, I discuss how I could have been more effective in my work by more consciously drawing upon other archetypes at certain stages of the process and how I can use these ideas in future studies. I hope that my reflection on the archetypes will help other researchers improve their own approaches to their work through consciously invoking archetypes.

The Hero Within: Six Archetypes We Live by

Pearson (1998) states that everyone is a hero, or has the possibility to be one. She describes six archetypes that heroes can consciously draw upon to move their lives forward in intentional and thoughtful ways: the Orphan, Wanderer, Warrior, Altruist, Innocent, and Magician. Although Pearson describes the archetypes in an order that somewhat corresponds to developmental and life stages, she states that it “does not mean that we leave one archetype behind in a linear fashion and go on to another” (p. 224). Indeed, she asserts that people should strive to activate aspects of each archetype, as needed, to create a balanced approach to life. When people are aware of the strengths and weaknesses of each archetype, they can consciously draw on the attribute most helpful for the situation. According to Pearson (1998), each archetype has an associated task and a gift to be realized. The six archetypes, including associated tasks and gifts, are summarized in Table 1.

Table 1. Tasks and gifts of the six archetypes

Archetype	Task	Gift
Orphan	Survive difficulty	Resilience
Wanderer	Find his/herself	Independence
Warrior	Prove his/her worth	Courage
Altruist	Show generosity	Compassion
Innocent	Achieve happiness	Faith
Magician	Transform his/her life	Power

Note. The information in the table is adapted from Pearson, 1998.

Orphan

The Orphan archetype is embodied when people see themselves as victims and focus on their suffering. However, they “need to learn to feel their feelings so they can move through them and let them go” (Pearson, 1998, p. 101). If they do not, they may move toward the negative aspect of the archetype, self-pity. Once they do resolve their feelings, though, they will realize that by surviving the difficulty, which is their task as an

Orphan, they have the gift of resilience upon which they can draw in order to move forward in their life.

Wanderer

While Orphans see life as full of suffering, Wanderers see it as an adventure. Through their journey, they seek to discover their own identity so that their work and life reflect their purpose and feed their passion. Thus, their task is to find themselves. Wanderers desire choice and creativity. They view themselves as outsiders and often feel a tension between fitting in and focusing on their own growth. Wanderers have the gift of independence and, as such, serve as scouts, bringing new ideas back to the group.

Warrior

Warriors are focused on achieving their goals and defeating the competition. The task of Warriors is to prove their worth, accomplished through the gift of courage. However, Pearson (1998) cautions that the Warrior is “a heroic archetype only when its courage and focus are employed for the greater good” (p. 106). Warriors who fight meaningless battles are susceptible to becoming victimizers, and taking advantage of others. Thus, it is important for Warriors to find their identity, so that their efforts contribute to greater meaning in their lives and those of others.

Altruist

When the Altruist archetype is activated, a hero's task is to show generosity, accompanied by the gift of compassion. Altruists sacrifice for others, committing to something greater than themselves. They seek to make the world a better place. However, when Altruists give beyond their means, they can become bitter about it, thereby moving into the negative side of the archetype. Therefore, it is important for Altruists to find an appropriate balance between giving to others and focusing on their own needs and ambitions.

Innocent

The Innocent archetype is guided by the gift of a deep faith in the unfolding of life. Innocents trust that the various situations in life lead them down the path for which they are destined. Through this surrender, they find happiness, which is their task. Pearson (1998) notes that the Innocent's approach is not completely passive; rather, they ask for what they need, with the expectation that their needs will be met. By learning to recognize possibilities, the Innocent archetype helps change the filter through which his/her life is viewed.

Magician

The Magician shares a basic worldview with the Innocent, but claims a greater amount of power, which is his or her gift. Innocents go with the flow and trust God, the

universe, and/or the process of history, but Magicians take responsibility in a more active and immediate way for the state of their lives or of the planet. Their task is to transform their life on an ongoing, daily basis by envisioning the desired outcome and then trusting synchronicity to help them work out the details.

Archetypal Reflectivity during my Research Process

When applied to the research process, invoking these archetypes can have a similar effect, especially if the researcher is seen as a hero on a journey. Before reading Pearson's book, I had not thought of myself as a hero in any aspect of my life. However, I now understand the research process as a journey similar to that of a hero, and that makes me feel empowered. The research process upon which I will be drawing is the study I completed for my dissertation. For each phase of research, I will describe my approach to it, and then identify the archetypes that were active for me during that phase. The phases that I have included are: identifying a research topic; conducting the literature review; defining research questions; collecting data; analyzing data; and writing up the results. Finally, I will reflect on the appropriateness of the archetypes embodied in each phase, as well as consider other archetypes that could have been helpful.

Identifying a Research Topic

When I was in the second year of my doctoral program, I sought a position teaching in a different school district so that I could live and work closer to the university. At that time, I was in the beginning stages of considering what topic I would research for my dissertation. I planned to continue working full time as a high school teacher, so I knew that, due to time constraints, it would be better for me to choose a topic that I could investigate within my school. Newly arrived to the school, I was excited by the myriad of possibilities. I read widely during those months, in an attempt to find something that resonated with my work context and me.

The topic that most captured my interest was teacher community. My former school was located in a small town and the school faculty was generally older. I enjoyed a wonderful professional environment there, but because I was young and single, I did not connect personally or socially with my colleagues. On the other hand, at the new school, which was located closer to the city, most of the teachers were young and single. I was struck by the quick personal and social connections that I made there. More of the student population was at-risk, so teaching there was more challenging than the prior school, but I felt a huge increase in personal connection with colleagues. Our conversations in meetings, at lunch, and between classes were much more dynamic than I had previously experienced. We also socialized regularly outside of school. Thus, I began to wonder about how and why a sense of community forms among teachers.

During this stage of my research, as well as my life, I felt very much like a Wanderer. Everything was new to me and I was trying to discover not only what I wanted to research, but also who I was as a teacher and person. As a new teacher in the school, I enjoyed experimenting with different ways to reach the students. Newly arrived to a larger city, I enjoyed meeting new people and being part of different social groups. I enjoyed the new connections I was making, and although I felt a strong sense of

community, I still felt like an outsider. Perhaps because my most important goal at the time was discovery, I moved between groups both within and outside work, not making really strong ties with any one group. All of these examples are common for Wanderers.

Although some researchers seem to know from the beginning what they want to study, I believe that, at some point, everyone must go through the stage of searching, which is characteristic of the Wanderer. Perhaps for some, it comes earlier, before they have even begun a doctoral program or decided to conduct research. For me, it came at the point that I needed it. I find it interesting that during that time, my personal life mirrored my academic and professional life. I believe that having the Wanderer archetype active in my life served me well and was useful in moving me forward in the process.

However, if research is to contribute to a collective transformation, I believe that more of the Altruist archetype should be invoked in this stage, so that contribution to the common good is a priority. When I first began my doctoral program, I wanted my dissertation topic to be focused on something that could make a difference for people. As I progressed through the program, though, I lost that focus as the realities of making decisions and moving forward with the research process became more important. Had I known about archetypal reflectivity, I might have been able to stay more focused on the goal of making a difference.

Conducting the Literature Review

After identifying my research topic, teacher community, the next step was to begin a more structured literature review. For me, this was the most difficult part of the research process. I felt lost and uncertain about my abilities and myself. I knew how to start - by reading and taking notes - but I did not know how to keep track of the sources and identify the connections between them. Working full-time did not help me maintain momentum and continuity in thought. I frequently felt overwhelmed by the extant literature on the topic and by my inability to tie it all together. I struggled through it, but eventually completed it.

The predominance of the Orphan archetype during this phase of my research process is clear: I struggled, but ultimately survived. As is typical with the Orphan archetype, I distrusted myself (Pearson, 1998). In part, my experience was a result of my innate strengths and weaknesses, but also tied to my lack of experience. I believe that when one is unsure about what they are doing, it is somewhat natural and easy to fall into the mode of suffering. However, perhaps it is helpful in order to realize the gift of resilience.

Again I believe that, and at this point in particular, I would have been more effective and empowered had I known about archetypal reflectivity. Instead of seeing so many obstacles, I might have learned to acknowledge my challenges and been able to consciously draw on a Warrior approach to complete the literature review. In addition, had my intentions been more Altruistic in nature, as I described in the previous section, I could have used the courage and focus for the greater good; as Pearson (1998) noted, it is important for a Warrior to be considered a heroic archetype.

Defining Research Questions

After completing the most difficult part of my research process, I relished the sense of freedom that accompanied defining research questions. I felt open to the many possibilities and expected that whatever I chose, it would be an interesting and successful process. As the fall semester progressed, I learned that my high school was planning to restructure the following year. The reform model that was chosen was schools-within-a-school, in an effort to create more personalized learning environments for students and small learning communities for teachers. With the new structure, students would be divided into “houses” and teachers would be moved out of their departmental groupings into either the freshman student house or one of the two upper level houses. Instead of the hallways being organized by departments, each one would contain a house.

Thus, I became interested in how the change in organization would affect the strong teacher community that I had experienced in my initial months at the school. I decided to conduct a pilot study in the spring to capture teachers’ sentiments of teacher community before restructuring, and then a full inquiry during the first year of the new structure to find out how the teacher community changed. The research questions that I developed were:

1. How did teachers describe the teacher community that existed in their school?
2. What experiences of teachers appeared to shape these descriptions?
3. What were teachers’ goals and beliefs about teacher community?
4. What experiences of teachers appeared to shape these goals and beliefs?
5. What were teachers’ views of a change in teacher community following the school’s restructuring of its organization to one that followed a schools-within-a-school model?

The Innocent archetype was most active during this stage of my research process. I was open to possibilities as I looked at my work environment through the lens of teacher community. I trusted in the synchronicity that I found between the school’s restructuring and my need for something of interest to study. Perhaps the Innocent archetype is the most appropriate at this point in the research process because it allows all avenues of investigation to be welcomed for consideration.

However, similar to identifying a research topic, I believe that the Altruist archetype should have been included during this phase of research, too. Because the choice of research questions has such a defining impact on the research process, had I intentionally invoked more of an Altruistic stance, perhaps my research would have had a positive influence on the school, instead of simply helping me complete my doctoral program. I think I would have been more proud of the results of my dissertation study if that would have been the outcome.

Collecting Data

My first step in collecting data was to identify and select participants to interview. For both the pilot study and the post-restructuring inquiry, I chose teachers who I believed would share openly about their feelings regarding teacher community. Because I

was a fellow teacher, I anticipated that people would trust me enough to be willing to say what they truly believed. I interviewed each teacher twice during the semester, asking him or her questions about his or her perspective of and experiences with teacher community, how it had changed with the restructuring, and his or her goals and beliefs about teacher community. In addition, I carefully observed teacher interactions throughout the period of inquiry and kept detailed field notes.

During this phase of the research process, I continued to draw on the Innocent archetype. In selecting participants to interview, I looked for the good in them and trusted in their honesty and willingness to participate. While interviewing and observing, I remained open to teachers' perspectives as I refined my data collection process. Because the research process is not meant to confirm previously held beliefs, I do not believe that any other archetype would have been as suitable. While collecting data, the Innocent archetype seems most appropriate to ensure openness to possible outcomes for the research and I think that trusting in the process is the best way to achieve that objective.

Analyzing Data

At the end of the school year, I had a vast amount of data collected from the interviews and observations. I deliberated about how to begin, but instead of feeling overwhelmed, I developed a system and set to work. After trying a couple of qualitative data analysis software programs, I settled on using NVivo. With some ease, I fell into the flow of the analysis of interview transcripts, field notes, and documents. Once I had a number of codes, I began to organize them into categories, from which four themes emerged. It was at this point that I felt particularly empowered and as though the study was really coming together.

When I began the data analysis, the Warrior archetype was most active. I worked somewhat methodically, but with sensitivity and attention to nuances and details. I felt as though I had figured out the process and was effectively working my way through it. When I reached the point of organizing the codes into categories and then themes, the Magician archetype became most active. The way in which I was able to find a cohesive explanation from the data felt magical.

As in the data collection phase, I believe that the archetypes that I unconsciously drew upon were the most useful while analyzing the data. Based on my current understanding and experiences with data analysis, I believe that maintaining focus and finding a process that works, along with allowing magic to unfold, are central and the most necessary aspects. Both of these outcomes can occur when the archetypes of the Warrior and the Magician are invoked.

Writing the Results

When I began writing up the results and conclusions from my study, I continued to find ways to make the process most effective and to tie together the various aspects of the data. Perhaps this occurred because I had made it through the most difficult parts of the process, and therefore felt resilient and empowered. In addition, I had developed a system of work that allowed me to be efficient and creative: I had become accustomed to

getting up early and writing before going to work. At that time of the day, I found my mental energy to be high and my ideas fresh.

As with the previous phase of my research process, I continued to draw upon the Warrior and Magician archetypes. Had I known about the idea of archetypes, I might have also tried to activate some of the Wanderer archetype. This would have allowed me to look at the results of my study from an outside perspective, perhaps thereby noticing other angles that would have helped to explain the data. In addition, I might have more consciously drawn upon the Magician archetype to make my ideas more cohesive and not as methodical, as is characterized by a more dominant Warrior archetype. The archetypes that were active for me in each phase of the research process are summarized in Table 2.

Table 2. Active archetypes during the phases of my research process

Phase of the research process	Active archetype(s)	Other potentially helpful archetypes
Identifying a research topic	Wanderer	Altruist
Conducting the literature review	Orphan	Warrior
Defining research questions	Innocent	Altruist
Collecting data	Innocent	-
Analyzing data	Warrior Magician	-
Writing the results	Warrior Magician	Wanderer

Discussion

My descriptions of archetypal reflectivity are specific to my study and my research process; therefore, they are not generalizable. However, now that I have considered how the archetypes were reflected during my research, I wonder if the stages I went through are somewhat common patterns for researchers or if they are unique to each individual or even to each study. Only conversations with other researchers and continued archetypal reflectivity of other research that I conduct will provide insight to these questions.

The most striking aspect of my archetypal reflectivity for my dissertation study is the absence of the Altruist archetype during the process. And, perhaps not coincidentally, I found a lack of Altruist sentiments from the study participants and within the school environment. I find this particularly interesting since most people enter the field of education (and research?) for Altruistic reasons – to contribute to the common good, to help people, and to share their knowledge. As I move forward in my research career, I would like to consciously invoke the Altruist archetype. Otherwise, collected wisdom only enhances the ego. I also want to find authentic ways of expressing my inner values through my work – what Parker Palmer describes as finding a place where “our deepest gladness meets the world’s deep need” (Palmer, 2000, p. 36).

As a research hero, I want to deliberately use archetypal reflectivity in my next “quest,” so that I work more intentionally and authentically. I want to be a hero who has

learned from past adventures and who strives to use that understanding and the knowledge gained from research to contribute to a collective transformation. I also want to share this process with other researchers so that we can all be the heroes we are meant to be.

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Author Note

Vanessa M. Villate, PhD. is an Assistant Professor of Pedagogy at Lamar University in Beaumont, Texas. She completed her PhD in Curriculum Studies at The University of Texas at Austin. Her current research interests include teacher leadership and successful novice teachers. Correspondence regarding this article can be addressed to Vanessa Villate at vanessa.villate@lamar.edu

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