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8-8-2016

## Finding Empathy in Historical Inquiry and Data Management Through an Educational Research Example

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### Recommended APA Citation

Chang, B. (2016). Finding Empathy in Historical Inquiry and Data Management Through an Educational Research Example. *The Qualitative Report*, 21(8), 1398-1408. <https://doi.org/10.46743/2160-3715/2016.2375>

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## Finding Empathy in Historical Inquiry and Data Management Through an Educational Research Example

### Abstract

In historical inquiry, researchers identify the research questions, specify the domain which relates to the research questions, and familiarize themselves with how the documents are structured and managed in the host library. In collecting data, researchers don't need to constrain themselves with how documents are labeled by the archivists. They can break the boundaries of the labeled documents and find out how seemingly unrelated documents are actually inter-related. In analyzing data, positivists and constructionists view history differently, which results in different approaches to how historical data can be analyzed. Positivists believe in transparency and universal truths across the historical data through data generalization and inference. In addition to generalization and inference, researchers should situate themselves in the historical context, establish empathy to feel the historical moments, and interpret data in the historical context. Revisiting and evaluating the process of a historical inquiry allows researchers to find out the patterns of historical events and the important points that might be missing in the field. This also provides a chance for researchers to evaluate the hosting, storage and management of historical data and identify the ways which can help improve data management so that future researchers can easily access the data.

### Keywords

Historical Method, Data Collection, Data Analysis, Document Management, History of Adult Education

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### Acknowledgements

I am very thankful for the Syracuse University Library Special Collections Research Center for financially supporting me through the Alexander N. Charters Adult Education Research Grant! This enabled me to collect the documents for my research project. I especially would like to thank the following people from the Special Collections Research Center who provided me with their great support, their professional help, and their hospitality during my trips to Syracuse University: Sean M. Quimby, Previous Senior Director of Special Collections; Barbara Brooker, Assistant to the Interim Senior Director of Special Collections; Nicole C. Dittrich, Reading Room Supervisor; Michele R Combs, Librarian/Lead Archivist; and Nicolette A. Dobrowolski, Head of Public Services, Reference Librarian. Other librarians at the Syracuse University Library who helped me during my visit were Dr. Alexander N. Charters and Dr. Tom Phelan who supported my project. All the adult educators who have been interviewed The author would also like to thank Dr.

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Leland Haraszti for his detailed editing of this paper.

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### Introduction to Historical Inquiry

History can find solutions from the past to inform the present and future trends. Hoxie (1906) regarded that “historical data are scientifically important only when they explain some matter of fact of vital interest to us” (p. 570), which is consistent with Dewey’s idea that historical knowledge is useful only when it can inform the current problems (Fallace, 2010). Historical inquiry allows us to reevaluate the historical data which relate to our current generalizations of the past, to understand the dynamics of the changes in the field of education, and to know the relationship between education and its historical context and culture (Good, 1966; Hill & Kerbert, 1967).

History is not just about historical facts; studying history enables us to see how a collection of unrelated ideas tie together to form a pattern (Studying history, n. d.). Historical inquiry helps us find the repetitive patterns, gain lessons based on past experience, and find out how a field has evolved as time goes on. “History helps one understand the sources of contemporary problems, how they arose and how their characteristics unfolded through time. It also identifies the solutions that worked in the past and those that did not” (Mason, McKenney, & Copeland, 1997, p. 307). For example, to understand an organization, we can study its historical path in order to understand how it evolved through time (Mason, McKenney, & Copeland, 1997).

However, in the field of adult education, there are few studies in adult education with the historical perspective. Taylor (2001), after examining all the papers submitted to the Adult Education Quarterly from 1989 to 1999, stated that “In contrast to the increase of

qualitative submissions, there continues to be a lack of historical research submitted to AEQ” (p. 336). There are few resources currently available which discuss the historical method. To support the development of historical research, it is important to know how to conduct research using the historical method and how to manage the chronological database to meet the needs of researchers. The purpose of this paper is to discuss how to collect, analyze, manage and evaluate data in the historical perspective. Specifically, I will focus on the process of targeting questions, specifying the domain areas from which I gathered the data, collecting and analyzing the data, as well as evaluating the whole process of historical inquiry to identify the important points reflected in the data. I will cite scholars’ views to discuss the process of how to collect, analyze and manage data from the historical perspective, and then use my data collection experience at the Syracuse University Library in 2013 and 2014 as a case to demonstrate this process. The literature review will be integrated into each step of the historical inquiry, and specific examples will be provided respectively so that readers can clearly see how each step is interpreted/processed in practice.

### **Specifying the Domain**

Historical data play an important role in research. Wallen (2009) regarded that:

Archival material bears the imprint of the bureaucratic, of that which has been institutionally preserved. It gives us traces of the dead, evidence of the past that has been recorded but not (yet) brought into the public space of the published book, of the library or museum; it exists as a mnemonic device, as what awaits the coming of the researcher to be brought back to life. (p. 261)

However, conducting a project using historical inquiry can be a very time-consuming and complex process. It requires researchers to dig into archival materials and sort out the information they need for their projects. Mason, McKenney, and Copeland (1997) stated that the process of performing historical study includes: Begin with focusing questions, specify the domain, gather evidence, critique the evidence, determine patterns, tell the story, and write the transcript. Before collecting data, the first step is to be clear about the domain of the data you plan to collect and to set up the boundaries of the data based on the research questions you asked and the specific indicators you identified. For example, in collecting data for my project about the history of American Adult education at the Syracuse University Library, I proposed to examine the history of adult education research and practice in the United States from the 1950s to the 2000s. I was interested in how adult education research and practice have evolved and shifted from decade to decade since the 1950s, and how the changed social contexts have shaped the direction of adult education research and practice in different decades. Specifically, I wanted to examine some indicators of the changed social contexts and how these indicators have influenced adult education research and practice. These indicators include those such as the social background of adult education; the important policies on adult education; the societal needs for adult education practice; the popular adult education topics supported by the federal government, foundations and other organizations; the influence of the leading educators, scholars and adult education organizations on the development of adult education; and the significant social events which have impacted adult education, etc. By examining these indicators which relate to adult education practice and research, I expected to learn how adult education research and practice evolved and shifted under different social contexts.

Once researchers are clear about their research purpose and questions, they can ask the librarians to give them a list of the documents available and the location of those

documents, from which they can identify the large domain where the documents are located. For example, before I collected data, I contacted the librarians and told them the purpose of my study, the questions I wanted to address, and also asked them to provide a list of the boxes where I could access the data I needed. Once I received the list of the data available in the library, I located the following domains as my major focus based on my research purpose and the research questions I wanted to address:

- AEA-USA/AAACE (conference materials, reports, publications)
- Alexander N. Charters Papers (reports, speeches and writings related to issues and important organizations in the field of adult and continuing education from 1950 to 1991).
- Clearinghouse Resources for Educators of Adults (CREA) Records (1975-1981; annual progress reports, white papers)
- ERIC Clearinghouse on Adult Education (ERIC/AE) (Records and articles which appeared in journals, various reports on ERIC/AE)
- Cyril O. Houle Papers (1950-1986; U.S. publications on adult education)
- Syracuse University Kellogg Project Records (1987-1994; Documents/reports about the history of adult education)
- Adult Education Audio and Video Collection (1952-1995)

### **Collecting the Data**

Once the domain is located, researchers will narrow down a large scope of information, label the documents as first priority or second priority data, and categorize the data based on the research purposes. Primary sources such as minutes of meetings, legal documents, correspondence, speeches, diaries, newspaper articles, score reports, the census maps, and photographs and secondary sources such as books and journal articles are the major sources for a historical study (Horsford & D'Amico, 2015). Primary sources and secondary sources can capture the historical events, people, meanings and ideas which happened in the past and shaped the present (Berg, 2001).

“Researchers should gather as many primary sources as possible. Primary sources are eyewitness accounts of an event” (Golder, 2000, p. 160). A primary source “is the *subjective* in interpretation of a witness to an event or activity, not just an original, unpublished manuscript” (Robyns, 2001, p. 377). Primary sources include those such as:

- (1) written, in the form of official documents, unpublished documents, diaries, memoirs, letters, memos, clippings, and the like; (2) material, in the form of objects, artifacts, and visit of actual sites; (3) traditional, in the form of stories of the past repeated by secondary sources; and (4) eye witness testimony. (Mason, McKenney, & Copeland, 1997, p. 313)

Secondary sources or public sources, such as annual reports, books, journal articles and documents, can provide the background information for an historical study (Mason, McKenney, & Copeland, 1997). Golder (2000) stated that:

Secondary sources are testimony from witnesses who were not present at the event of interest. Although the testimony of secondary sources is not as authentic, it can provide important corroboration or add missing details that are consistent with the testimony of primary sources. (p. 160)

I simultaneously collected primary and secondary sources for my historical project. In 2013, I collected documents about the Adult Education Task Force (1960s), Education for Public Responsibility (1960s), some important adult education organizations such as the Adult Education Association of the U.S.A. (AEA-USA), CPAE (Commission of Professors of Adult Education), UNESCO; Lifelong education in the 1960s; The Annual report on adult education in the 1950s, 1960s and 1980s; and the lists of the papers presented at the AERC conferences in the 1970s. These materials I collected gave me contextual information about the historical development of adult education from the 1950s to the 1970s. In 2014, I continued collecting the documents relevant to adult education research and practice from the 1950s to the 2000s. I especially focused on the reports, publications, and articles after the 1970s. Within two weeks, I had collected a large amount of data which I needed through making copies of the minutes of meetings, related correspondences, and memoirs, taking photos of the titles of the conference proposals and journal articles, collecting some pictures of the events and major leaders in the field, and checking the related online resources.

The secondary resources can help researchers connect the dots of the primary resources together in a historical context. Researchers search the secondary resources immediately through online databases or through an internet search while they are collecting their primary resources. For example, while I was collecting information about the 1980 adult education handbook, I immediately searched the following books which were mentioned in the primary sources to find out if they relate to the historical project I was doing:

- Boyd, R. D., & Apps, J. W. (1980). *Redefining the discipline of adult education*. San Francisco: Jossey-Bass.
- Kreitlow, B. W. (1981). *Examining controversies in adult education*. San Francisco: Jossey-Bass Publishers.
- Long: Changing approaches to studying adult education
- Peters, J. M., 1941. (1980). *Building an effective adult education enterprise*. San Francisco: Jossey-Bass.

“Official documents often record national historical events. Researchers generally could collect some great happenings of that time concerning the overall situation” (Yang, Zang, Yang, Chang, Bu, & Xing, 2014, p.748). However, eyewitnesses implant a living voice. They play an important role in interpreting the variances and the missing points in these official documents. Wallen (2009), for example, stated that:

The archive helps us understand the powers of transformation illustrated by eyewitness narratives, but returning to the archive cannot itself provide a compensatory transformation — one that would restore a feeling of autonomy, or of concord between self and society, or reconcile disparate forms of memory. Nor can the encounters with these materials make us “whole” again, filling the gaps in our knowledge, overcoming our belatedness, and letting us finally know “what it was really like” or “how it really happened. (p. 275)

When I collected data, I could not tie all of the pieces of the vast amount of historical data together and understand them in the historical context. It was necessary to interview some adult educators who were in leadership positions in the main adult education organizations such as AEA-USA/AAACE (American Association for Adult and Continuing Education) and who witnessed the historical moments described in the documents. Interviewing some adult educators in leadership positions helped me connect the dots in the historical documents and understand the historical threads across the different decades.

Compared with word texts that can carry complex and abstract meanings, images directly reflect the meanings of the time and are value- and bias-free. They can vividly show the contextual background of the people/events at that time (Perlmutter, 1994). Even though the majority of the data were text-based, there were also some pictures provided by the adult education organizations. I also collected these visual data in order to help me understand the historical context of the data.

The librarians grouped the documents based on certain common criteria. However, researchers each have their own research agenda. Compared with the traditional ways of collecting materials on their isolated merits, the new tendency is to select materials in a larger context; “taking a broad view of the historical record and allowing for the interests and capacities of other repositories” (Grigg, 1991, p. 234) will help researchers find sources in and through repositories. When researchers collect data, they need to look beyond the categories set up by the archivists and create their own organizing system as they go through the repositories. When I searched the category of adult education, I did not intend to collect information about community education, continuing education, literacy education, and adult continuing education. However, out of curiosity, I quickly screened them and found related policies. These policies gave me a more in-depth understanding of adult education in a larger historical context. I found plenty of documents about lifelong learning, such as policy for lifelong learning in the 1970s, materials about a lifelong learning retreat and plenty of raw materials about the discussions/papers which related to the aforementioned lifelong learning retreat. I searched the library databases in the university where I work and I found one published book which documented what has been discussed about lifelong learning documented in the Syracuse University library. What the reader should know, is that lifelong learning was a popular term that was interchangeable with “adult education” in the 1980s. But later, lifelong learning was not continuously supported. What happened which caused the impact of lifelong learning to diminish in its flow along the historical river? Though lifelong learning is not a topic I had planned to examine, bumping into a different territory that I did not expect to explore provided me a new area which actually relates to the history of adult education and helped me discover the changing landscape of adult education in certain historical context.

### **Analyzing Data**

In a historical inquiry, researchers not only report the facts, but also try to understand the meanings of the events, to interpret and explain the facts, and to infer the meaning from the facts (Mason, McKenney, & Copeland, 1997). The dominant view of historical inquiry is that historical narrative should be transparent to maintain its objective truth. Like the positivist approach to studying science and finding out the general norms through measuring the central tendencies, the dominant tradition in studying history relies on collecting facts and conceptualizing the repetitive common occurrences (Firat, 1987), or finding out the causal chains in timelines that have influenced history (Mason, McKenney, & Copeland, 1997). Inferences and interpretations can be used to generalize the meaning of the events out of data that are relevant to the present (Golder, 2000). Quirk (2008) stated that:

All forms of historical inquiry invariably have important normative and praxeological dimensions. For theorists who view history as a realm of recurrence and repetition, the key point at issue is effective management. By exploring cyclic historical patterns, they cautiously seek to identify ways of mitigating the worst effects of enduring structural forces. For theorists who

view history as a realm of contingency and complexity, the key point at issue is fundamental change. (p. 532)

Researchers are provided various methods to manage and analyze historical data. Historical data can be organized chronologically so that causal effects and contradictory evidence can be recognized in an appropriate context (Golder, 2000). Researchers can use data processing software such as D2K to retrieve the data they need and avoid the large amount of redundant data; they can use the key-words-in-context approach to study highly relevant results; they can also use visualization to create various forms of historical data (AHRC ICT Methods Network, n.d.). Timelines, maps, graphic organizers, etc. are all different visual formats that can be used to analyze, manage and represent data (What to teach, n. d.). During the process of finding sources through repositories, making notes and writing down your thoughts while you are processing the data will significantly help you sort out the data and generalize the themes. Such note-writing can help you document, retrieve, and decipher the major points in the data you collected. "What writing does, however, is to provide a graphic representation that is typically both stable and publicly accessible and that therefore can be made the object of pointing, annotating, filing and retrieving, etc." (Schmidt, 2012, p. 216).

Content analysis can help researchers make inferences by identifying the characteristics in the historical text (Stone, Dunphy, Smith, & Ogilvie, 1966). Researchers transform the content into numerical terms by counting the frequency of the terms occurring in the text. Inferences are developed through frequency count, with which themes are developed. Statistical techniques can be applied to help researchers count the frequency of the terms which occur in the text (Moodie, 1971). I used content analysis to examine the titles of the articles and proposals that were accepted by the major adult education conferences and journals since the 1950s. Counting the frequencies of the terms which occurred in the conferences and journals helped me to identify what really mattered during this period of time. Content analysis can only provide the general patterns of the recurring terms. However, it was not able to sufficiently help me understand why certain groups of terms occurred more frequently than other terms in the main publications, how history is constructed, and why certain topics were highly represented in a certain historical period of time.

Some scholars regard that what matters most is not the origin of the objective history, but how history is represented and constructed, which determines the selection of evidence and its meanings (Munslow, 2001). For Dewey, history is contingent; historians have constructed history by selectively choosing which documents to preserve, and which topics and facts to include: "Historians rip facts from the textual and temporal contexts from which they emerge and place them in a new narrative context of their creation" (Fallace, 2010, p. 27). Generalizations can build the foundation for us to know history, but are not sufficient for us to totally understand history, since they do not represent the variant characteristics in history. Historians seek generalizations, and at the same time recognize exceptions (Golder, 2000). To understand the historical variations, it is necessary for researchers to situate themselves in the historical context. Mason, McKenney and Copeland (1997) called it establishing empathy. They stated that "achieving empathy with the protagonists in the study requires that the researchers imagine themselves in the real actors' environment and put themselves in their minds" (p. 316) and see the events through the eyes of those who experienced them. In addition to examining the key terms and events in the data, researchers also need to read through other documents to feel the historical moments. I read some documents which, on the surface, are not related to the history of adult education, but helped me understand the nature of adult education from a living life perspective. For example, I read beautiful speeches such as *A case for public school adult education, Text of speech given*

by Robert Blakely at the Arden House institute, March 1959, and *Liberal adult education: its meaning and its goals*. In these speeches, historical figures/educators/officials provided beautiful and insightful thoughts about adult education from a living life perspective. This is so different from the larger context of adult education nowadays, which is very utilitarian and professional-driven. Reading these side documents enriched my understanding of adult education in the past and enabled me to see and feel how adult education was integrated into our living life at that period of time.

### **Revisiting the Process of Historical Inquiry**

Historical data is instrumental in assessing the patterns of historical events and long-term baselines. It can inform the key aspects of a historical event, evaluate the conditions of it, and help researchers determine practical management units (e.g., Kittinger, Houtan, McClenachan, & Lawrence, 2013). As I have stated at the beginning of the paper, I initially identified some domains of data that I planned to collect in order to meet the purpose of my study: to examine how the changed social contexts have influenced adult education research and practice. These domains of data include indicators such as the important policies, organizations, educators and social events that have impacted the field of adult education. Revisiting and evaluating the process of historical inquiry can help researchers find out the patterns of the historical events and the important points which might be missing in the field.

Context is important in studying historical data. “Historians examine how broader social, political, economic, or cultural forces shaped individuals, events, institutions, and ideas” (Horsford & D’Amico, 2015, p. 866). The concrete context and process information of the historical events, people and institutional activities can help researchers trace the continuity and change of the history across timelines and thus better understand the broader trends of the social and cultural forces. In the process of collecting the historical data, I have successfully accessed the various historical events, organizations and educators, gained concrete contextual information for my research project, and noticed some changes in adult education organizations. For example, the AEA (which is now called the AAACE after merging with the NAPCAE) and other adult education organizations have provided very detailed historical information about their conference planning, business meetings, budgets, etc., and have also documented the process of how these adult education organizations are managed and structured. Specifically, the AEA documented the significant issues which occurred yearly, and discussed how to lobby the federal government to get financial support. Such data depict the changing dynamics and detailed activities of adult education at that historical period of time. Historical methods “aid understanding of how specific *contemporary* educational theories, policies, practices or settings originated and how they developed under the influence of social, cultural, political and economic factors” (Freatly & Parker, 2010, p. 233). By examining the AEA, I noticed that similar valuable data are missing in the current AAACE documents. This necessarily caused me to ask the question, what happened which caused the AAACE to not continue the tradition which the AEA began? These missing data might provide some important information in terms of the changing landscape of adult education.

The purpose of data management is to “ensure that the researchers document how they collected their data and how they transformed the data from raw to processed to analyzed data, and to ensure that the data is described in a way that is understandable” (Surkis & Read, 2015, p. 154). Firsthand documents, i.e. the raw data, can be analyzed, processed and transformed into refined products such as articles or books. The Syracuse University Library is the hub for the raw materials in the field of adult education. New materials are continuously being sent to the Syracuse University library and managed and

sorted by the librarians in a way which cannot satisfy every researcher's needs. As a researcher, I have my own specific purpose, and I manage the order of the materials based on the purpose of my research project. Many detailed documents are like pearls hiding in the big sea. While collecting data, I noticed that some raw materials and the books/articles developed from these raw materials were separated and put into different boxes. I needed to look over every folder one by one and pull the data out and find the connections between them. This is a time-consuming process, but it allowed me to see not only how the raw data were processed and transformed into refined products, but also what was deleted or adjusted, and what was negotiated during this process, which helps us see the changing dynamics and the causes of the events. "Analyzing perspectives is also essential for causal analysis. Trying to understand how people thought or what motivated them helps us understand why things happen. Identifying multiple and different points of view help us understand the dynamics of conflict" (Downey & Long, 2016, p. 23).

History is what the historians understand of the past. Downey and Long (2016) stated that:

This fundamental historical understanding is embodied in the notion of accounts. An account is a later interpretation of what happened during some past event or episode or era. It is usually a written narrative or exposition, but can also be an oral account, an enactment, or a film or other graphic presentation. (p. 23)

The trends of adult education can be evaluated by examining the key words published in the representative journals, the written text, as well as the oral and visual data. However, sometimes, this might be difficult when the data are not managed well. For example, a key-word study of the articles accepted by the adult education conferences and journals helped me to find out the trends of the topics in the field of adult education. However, I noticed that in the database, the raw materials from the conferences such as the minutes of the meetings were mixed in with the conference papers. This made it very time-consuming to pull out all of the topics in the conferences in order to perform the content analysis. Examining the titles of articles published in the representative journals is another way to identify how the trends of adult education shifted historically. The written text in some titles with implicit words or metaphors are highly context-based and "may leave wide spaces for doubt and be open for diverse interpretations" (Schmidt, 2012, p. 216). To decipher their meanings, I had to briefly read the introduction of the papers and dig into the historical context of the articles rather than merely scanning the titles of the articles.

### **Conclusion and Recommendations**

History informs the present and the future by showing us the patterns which repeatedly occur over time. It helps us see the sources and causes of the problems and the evolution of the field. In historical inquiry, researchers need to identify their priorities in the domain and collect as many primary sources as possible, and at the same time collect those secondary sources which are highly related to the topic or are mentioned in the primary sources. In addition to the archival data, researchers can also collect the data from the eyewitness since the eyewitness and the archive are intertwined in the works of history (Wallen, 2009). In collecting data, researchers don't need to constrain themselves with how documents are labeled by the archivists since "the archiving of an event involves a different form of registration, of retrieval, and of institutionalization. An archive offers the possible encounter not only with the traces of memory, but also with systemic processes of ordering

and transforming experience” (Wallen, 2009, p. 276). The way the archivists organize and institutionalize the documents may not match the needs of the researchers. Researchers can break the boundaries of the labeled documents and find out how seemingly unrelated documents are actually inter-related.

Positivists and constructionists view history differently, which results in different approaches to how historical data can be analyzed. Positivists believe transparency and universal truths across the historical data through data generalization and inference. Researchers can list data in chronological order, through which to infer the cause-effect relationship and the evolution of the field. Researchers can also use content analysis to study the frequency of the terms occurring in the historical data, from which they can generalize the common themes and repeated patterns. Generalization and inference are not sufficient for researchers to understand why certain historical events happen. Situating themselves in the historical context, or establishing empathy enables researchers to feel the historical moments and explain and interpret data in the historical context.

Revisiting the process of historical inquiry provides researchers opportunities to find out the patterns, the missing points, or the changes in the field. It also allows researchers to evaluate the hosting, storage and management of historical data and identify the ways which can help improve data management so that future researchers can easily access the data, identify the relevance of the data, easily understand the historical background of the data, and efficiently collect sufficient data within a given time frame. “Data management is essential to making data discoverable, accessible, and understandable, and making things discoverable, accessible, and understandable is a key part of what librarians do” (Surkis & Read, 2015, p. 156).

Studying a long period of history in a field requires a researcher to examine an enormous amount of primary and secondary historical materials. This process gives researchers an opportunity to evaluate the data management systems provided by various stakeholders and to see the gaps that need to be filled in order to support researchers in collecting historical data efficiently. When I was collecting historical data, I experienced some difficulties due to inconsistent data or data that were not well documented. To support future researchers to collect historical data efficiently, data host libraries and the agents which provide historical data, conferences and journals need to consider re-managing the data. For example, to provide rich historical data for future researchers, the organizations in the field of adult education, such as AAACE should (a) not only report its management and logistical issues, but also the most significant issues/questions/topics which happened during the previous year; (b) document the main opinions/trends of the yearly conferences; (c) document the most significant work of the previous year; and (d) document the struggles, and the reasons which caused those struggles. One or two-page documentation about the yearly main opinions/trends would record the features of adult education in that year and provide very valuable information about the development of the field historically, thus enabling future researchers to easily capture the trends of the adult education in a different period of time. The chronological records with the yearly highlights will provide clues for future researchers about how the field has changed its landscape historically. The AAACE could also add some photographs of important events and important research articles about the conference to its webpage under history/scholarship and provide the printed documents or even audio/visual media on the AAACE website.

It would be very helpful if in the future, a conference would use graphics to list the table of contents of all the topics selected by this conference on the cover page. For the journals, at the end of the year, the final issue could include the index of all of the titles of the papers published in that journal in that year. In this way, researchers would not need to check all of the issues of every year in order to count the frequencies of the terms used in the titles.

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I am very thankful for the Syracuse University Library Special Collections Research Center for financially supporting me through the Alexander N. Charters Adult Education Research Grant! This enabled me to collect the documents for my research project. I especially would like to thank the following people from the Special Collections Research Center who provided me with their great support, their professional help, and their hospitality during my trips to Syracuse University: Sean M. Quimby, Previous Senior Director of Special Collections; Barbara Brooker, Assistant to the Interim Senior Director of Special Collections; Nicole C. Dittrich, Reading Room Supervisor; Michele R Combs, Librarian/Lead Archivist; and Nicolette A. Dobrowolski, Head of Public Services, Reference Librarian. Other librarians at the Syracuse University Library who helped me during my visit were Dr. Alexander N. Charters and Dr. Tom Phelan who supported my project. All the adult educators who have been interviewed The author would also like to thank Dr. Leland Haraszti for his detailed editing of this paper.

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### Article Citation

Chang, B. (2016). Finding empathy in historical inquiry and data management through an educational research example. *The Qualitative Report*, 21(8), 1398-1408. Retrieved from <http://nsuworks.nova.edu/tqr/vol21/iss8/4>

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