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From Participants to Co-Researchers: Methodological Alterations to a Qualitative Case Study

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Abstract

Researchers request a variety of levels of engagement from their participants in a research study. This can range from merely serving as a data generation opportunity to being actively involved in each stage of the project. The latter is a co-researcher. In this paper, I explore how nine participants in a qualitative case study became co-researchers by the study's conclusion. The increase in their active participation required methodological alterations to the project while I conducted the study. This paper presents these alterations by examining: (1) my position as a researcher; (2) my relationship with the participants; (3) the trajectory of the project; (4) data analysis; and (5) the presentation of the findings. I conclude with a discussion of such alterations for qualitative research and offer suggestions for novice researchers when experiencing situations during research that may warrant unanticipated methodological changes.

Keywords

Co-Researcher, Interfaith Dialogue, Methodological Change, Qualitative Research, Responsive Research

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From Participants to Co-Researchers: Methodological Alterations to a Qualitative Case Study

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Researchers request a variety of levels of engagement from their participants in a research study. This can range from merely serving as a data generation opportunity to being actively involved in each stage of the project. The latter is a co-researcher. In this paper, I explore how nine participants in a qualitative case study became co-researchers by the study's conclusion. The increase in their active participation required methodological alterations to the project while I conducted the study. This paper presents these alterations by examining: (1) my position as a researcher; (2) my relationship with the participants; (3) the trajectory of the project; (4) data analysis; and (5) the presentation of the findings. I conclude with a discussion of such alterations for qualitative research and offer suggestions for novice researchers when experiencing situations during research that may warrant unanticipated methodological changes. Keywords: Co-Researcher, Interfaith Dialogue, Methodological Change, Qualitative Research, Responsive Research

As a graduate student at the University of Georgia, I was trained that qualitative researchers conduct research with their participants, rather than on their subjects. While this may seem nothing more than a difference in semantics, it represents a key characteristic in the difference between qualitative and quantitative research. Qualitative researchers typically have a closer relationship with their participants in research (Fraenkel, Wallen, & Hyun, 2019), recognizing them as a more active part of the research process than as just a research subject. In studies that use data generation methods such as interviews and participant observation, researchers will forge these relationships and establish rapport with participants before a study begins and they may even continue after the close of a research project (Miller, 2017). Developing rapport with participants takes effort on the part of both the researcher and the participant (deMarrais, 2004). Close relationships with participants can lead to a deeper involvement than a researcher anticipated at the outset of the project.

The type of participation a researcher requests from their participants often depends on the design of their study and their approach to research. In qualitative research, there is a wide range in levels of participation. On the most active end of the spectrum, participants can become co-researchers who are involved in each stage of the research project (Boylorn, 2008; Mealman & Lawrence, 2002). According to Boylorn (2008), co-researchers are “joint contributors” and “investigators” in a research study (p. 600). She wrote that, “this qualitative research approach validates and privileges the experiences of participants, making them experts and therefore co-researchers and collaborators in the process of gathering and interpreting data” (Boylorn, 2008, p. 600). Co-researchers are commonly involved in designs such as participatory action research (PAR; Chevalier & Buckles, 2019; Jordan, 2008) and applied ethnography (Pelto, 2013). If researchers do not follow such designs in planning their project, it can be a surprise when participants wish to be involved so deeply. And, when a researcher does not intend at the outset of a project for participants to assume this role, the researcher must

decide whether they will modify their research project to incorporate interested and capable participants or remain on their original course.

In cases such as this, methodological adjustments may be necessary for the researcher to remain responsive. Responsiveness is “an interaction between researcher and research participant that generates the information or data sought where knowledge flows both ways between researcher and participant” (Preissle & deMarrais, 2011, p. 32). This paper is a discussion of methodological alterations I made to remain responsive in my dissertation study. I explore the way in which nine of the participants of my qualitative case study gradually became co-researchers, to varying degrees, throughout the course of the project. I spent a period of 16 months interacting with the participants, seven of which included data generation in the field and data analysis. I generated data through participant observation, interviews, focus groups, and the collection of documents.

The case in this study was an interfaith dialogue group of Jewish, Christian, and Muslim adults located in the southeastern U.S. The dialogue group had been meeting monthly since 2001 and, at the time of this writing, is still an active organization. The leadership group of the organization refers to themselves as the steering committee and is comprised of two Protestant Christians, one Roman Catholic Christian, two Sunni Muslims, and two Reform Jews. These seven leaders plan and facilitate group meetings. The purpose of the study was to explore a community-based interfaith dialogue program, examining both the process of interfaith dialogue and the results of long-term participation in interfaith dialogue. The research questions guiding the case study were:

1. What happens when Jewish, Christian, and Muslim adults engage in interfaith dialogue?
2. How do facilitators of interfaith dialogue prepare for and guide dialogue sessions?
3. In what ways, if any, does interfaith dialogue foster perspective transformation with regards to the religious other?

I did not intend to include participants as co-researchers. As such, I did not design the case study to include a participatory element. However, nine individuals indicated a strong desire to be involved as more than just participants. This came as a surprise to a novice researcher such as myself. To maintain the integrity of the study by accurately representing the environment within the case, I needed to modify certain aspects of my methodological approach. I identified the aspects to modify based on the participants’ interest in being involved in them, such as study design, recruitment, data interpretation, and analysis. Due to the high level of interest and interaction, these nine participants became increasingly involved in the project as the study progressed. Seven of these nine participants served on the steering committee of the interfaith dialogue group. They were also my gatekeepers, those individuals who provide researchers access to organizations and groups in a research study.

In what follows below, I first briefly examine the literature on co-researchers in qualitative research. I then discuss how the methodological changes to work with the participants in this new role impacted my position as a researcher, my relationship with the participants, the trajectory of the research project, data analysis, and the presentation of findings. I close with proposed guidance for other researchers, particularly students and novice researchers, in similar situations that may call for methodological changes.

Review of the Literature

Most commonly, co-researchers exist in participatory designs across a variety of disciplines (Bates et al., 2018; Blair & Minkler, 2009; Jordan, 2008; Moreno, 2015; Northway, 2017; O'Brien, Munn-Giddings, & Moules, 2018; Tanner, 2019). Participatory research designs that employ co-researchers is a growing trend. This brief review presents studies that examine or reflect on the use and value of co-researchers. One major area in which the use of co-researchers is growing is the health sciences (Marks, Mathie, Smiddy, Jones, & da Silva-Gane, 2018; Staniszweska, Jones, Newburn, & Marshall, 2007). Health researchers suggest that using co-researchers is beneficial in a variety of ways. Groot et al. (2019) suggested that the use of co-researchers in their study allowed for them to understand how the ethics of care framework offers researchers the opportunity for better adherence to ethics in participatory health research. Shen et al. (2017) indicated that including parents as co-researchers allows health research to be more relevant to participants, increases participation, and allows parents to feel empowered while researchers work with their children.

Literature that examines the use of co-researchers is becoming more prevalent with specific populations of people. One such population is children (Chimirri, 2015; Cutter-Mackenzie & Rousell, 2019; Juhl, 2019). Researchers have found that using children as co-researchers can be valuable because, despite its inherent challenges (such as power relations and education), it allows for children's voices to be stronger in research while simultaneously affording more ethical relationships between the researcher and child participants (Bradbury-Jones & Taylor, 2015; Broström, 2012; Honaken, Poikolainen, & Karlsson, 2018). Since many researchers conduct research with children, involving them as co-researchers enhances their participation and is a unique way to respect their rights in the research process (Dunn, 2015). As advice to researchers, Willumsen, Hugaas, and Studsrød (2014) stressed that the limitations of working with children in research, such as their lack of power among adults and understanding of research processes, means that the term co-researcher is misleading when referring to children. Instead, they declared that, "perhaps the terms 'participants,' 'consultants,' or 'advisors,' depending on the goal of the activity, research or social change respectively, would be more appropriate, and indicate more strongly where the ethical responsibility for the involvement lies as well as its limitations" (p. 345).

Instead of working with children as co-researchers, other researchers are working with parents. Including parents as co-researchers allows for more equitable power structures (Jurkowski et al., 2013), greater likelihood for social change as a result of the research (Jurkowski et al., 2013; Rowe, 2006), and better understandings of the experiences of children from a parenting standpoint (Foster & Young, 2015; Hackett, 2017). Similar to the value of working with children as co-researchers, researchers found that working with parents in this way, particularly when examining sensitive and vulnerable topics, afforded deeper insight into the topic that would not be available had the parents simply been participants or subjects of the study (Foster & Young, 2015; Jurkowski et al., 2013; Walmsley & Mannan, 2009). While there is value to including parents as co-researchers, both Rowe (2006) and Shen et al. (2017) warned that this participatory research practice has a strong limitation in the attempt to align researcher and co-researcher motivations, in that formal researchers and co-researchers may go into the project with different goals and understandings of their roles in mind.

Other populations include indigenous and native peoples as co-researchers (Allen et al., 2006; Datta et al., 2015; Dieter, McKim, Tickell, Bourassa, & Lavalley, 2018; Genius, Willows, First Nation, & Jardine, 2015). Working with indigenous and native peoples has specific benefits to the research process. Datta et al. (2015) found that working with members of indigenous communities in Bangladesh honored the experiences of these individuals better than including them as traditional participants. As an example of wider benefits, Genius et al.

(2015) wrote, “knowledge co-generation through partnerships between Indigenous youth and scientists builds knowledge that is credible in both the community and academia” (p. 7).

In working with adults with disabilities, Stevenson (2014) indicated that these adults feel empowered by the research process. O’Brien, McConkey, and Garcia-Iriarte (2014) found that these co-researchers kept them focused on the experiences and the realities of the participants. Yet, integrally important in working with adults with disabilities as co-researchers is that researchers must consider issues of power and how they may serve as modified care givers during the study (John et al., 2018; Redmond, 2005). Finally, becoming increasingly common in research across academic fields is working with older adults as co-researchers (Bindels, Baur, Cox, Heijning, & Abma, 2014; Stevenson & Taylor, 2019). Redmond (2005) suggested there are unique power dynamics when utilizing adults with disabilities as co-researchers. As such, he wrote that when working with “disabled co-researchers” researchers must rise to the challenge of attempting to “meet responsibilities while rejecting a model of ‘caring’ which locates the ‘carer’ and the ‘cared for’ in a relationship that is constructed around notions of power and passivity” (p. 82). Similar to other studies mentioned in this review, including older adults as co-researchers can offer the researcher an enhanced insight into their experiences (Gutman et al., 2014; Littlechild, Tanner, & Hall, 2015; Tanner, 2012).

In almost every source included in this review, co-researchers have a variety of roles and levels of engagement, each determined by the design of the study at the outset of the study. This means that the decision to use co-researchers in a study is most often intentional from the outset of the project. In such projects, these co-researchers are involved in the design of the project and they are educated in the research process through avenues such as the clear discussion of roles, debriefing sessions, and basic training in data collection and analysis methods (Boylorn, 2008; Littlechild et al., 2015; Williams & De Ruyck, 2013).

Researchers make attempts to encourage feelings of equality between the academic researcher and co-researchers (Bindels et al., 2014). This focus on equality underscores the need to keep in mind the power imbalance between the “academic” researcher and co-researchers from the community and power must be negotiated throughout the project (Blair & Minkler, 2009; Gutman et al., 2014; Shen et al., 2016). For example, Littlechild et al. (2015) wrote that the researchers “acknowledged the tension they encountered in the interview process between keeping the interview ‘on track’ and ceding control to the co-researchers to carry out the interview in their own ways” (p. 29).

The creation of reciprocity and strong relationships between researchers and co-researchers is essential to the success of such participatory designs (Frankena et al., 2019; Tanner, 2012). This necessitates that researchers be flexible in the research process. They must be open to accepting co-researcher perspectives of data collection, methods, and analysis (Bindels et al., 2014; Schilling & Gerhardus, 2017). O’Brien et al. (2014) stressed that researchers must be willing to work at the pace of the co-researchers to support both these relationships and the other previously discussed benefits in this review.

Co-researchers can contribute immensely to a research project, particularly when researchers have good rapport, are responsive in their research behavior, and ethical in their interactions with their co-researchers. In the remainder of this paper, I will chronicle how my project changed to embrace some participants in a new role as co-researchers and conclude with suggestions to novice researchers in similar situations.

Position as Researcher

The first area of change was to my position as a researcher in the project. As a new researcher, I did not have experience with participatory models and working with co-researchers, nor did I know the possible value they could add to such a project. Thus, I had

planned on taking a solitary role in all aspects of the project. I designed a study in which I was a passive participant observer for the entire project (Spradley, 1980). A passive participant observer is present, but avoids interaction in the scene they are observing. While still remaining passive during my observations of interfaith dialogue meetings, my co-researchers began to invite more active participation on my part during steering committee meetings. Upon their request, I answered questions about what I thought about the trajectory of larger group meetings, gave my thoughts about planning for larger group meetings, and occasionally participated in the general conversation. While I would still not characterize the change as becoming moderate participation (Spradley, 1980), I began to move away from true passive participant status.

A second way my position as a researcher changed was in the level of control I had over three particular areas of the study: (1) introducing the project at each large group meeting by allowing one of the nine co-researchers to do this (this was always done by one of the co-researchers who was also a steering committee member; I would then take over and discuss the consent process); (2) the selection of individuals to invite to participate in interviews; (3) scheduling (time & location) of meetings and interviews. These areas will be explained in further detail below, but here they serve as examples of how my position changed from one in which the researcher is the sole organizer and planner to a more collaborative one.

Relationship with Participants

Second, through the participants' desire to be more active in the project, I was able to develop closer relationships with them throughout the course of the project because of consistent contact. I became more comfortable sharing information about my personal and academic life in meetings and at the beginning and/or end of individual interviews. Bindels et al. (2014) discussed this behavior in their project on working with co-researchers, stating that this type of sharing contributes "to more personalised contact between parties since the academic researcher opened up and shared more of her personal history and what it is she does" (pp. 965-966).

More personalized contact and the sharing of such personal information by a researcher goes a long way in the development of good rapport with participants. To create strong rapport with participants, some encourage researchers to be open, honest, and willing to share one's own experiences in conversation and interviews (Montgomery, 2012; Oakley, 2016; Rapley, 2006). This means that researchers should be comfortable in sharing their subjectivity and be aware of how it impacts their interactions during a research project. In this project, interviews often became more casual and conversational as I became more comfortable answering questions (Roulston, 2010). For example, I would answer the participants' questions about my own religious beliefs and personal life at the end of each interview. Because of the strong rapport we created, my relationship with the participants has continued since the completion of my dissertation study with discussions of future projects and social gatherings.

Trajectory of the Project

The third area of modification was in the trajectory of the project, which I altered to incorporate the enhanced participation of the co-researchers, particularly the seven who were also steering committee members. An example of this was in the expansion of the member checking process (Maxwell, 2013; Roulston, 2010). Sandelowski (2008) explained that in member checking, participants evaluate the data to be sure the researcher:

(a) accurately rendered their experiences that were the target of study, in the service of what Joseph Maxwell described as descriptive validity; (b) researchers fully captured the meaning those experiences had for them, in the service of what Maxwell called interpretive validity; or whether (c) researchers' final interpretive (e.g., ethnographic, phenomenological) accounts of those experiences do justice to them, in the service of what Maxwell called theoretical validity. (p. 502)

Basically, member checking is a time for participants to confirm that researchers got things “right.”

On a darker note, Sandelowski (2008) also explained that member checking can be a controversial process because participants may be unclear about what they have the right to the ability to validate. There are questions of whether the member checking process will endanger or cause discomfort to participants by presenting them with an opportunity to regret what they said in the transcript. Additionally, member checking could lead to threats on the credibility of the data as participants could validate something with the sole purpose of not offending the researcher. Thus, it is arguable that the focus of member checking should be less on credibility of data and “more about an opportunity for further reflecting on members' own experiences and for self-transformation” (Sandelowski, 2008, p. 503).

Initially, I meant to hold individual member checking sessions with participants to present my findings. I intended to share data with participants only as requested. As the participants became co-researchers, I elongated the member checking process and made it more collaborative. I developed a system of sharing data and preliminary analyses electronically. This system led to a continuous dialogue on data that spanned the length of the project. When sharing data, researchers must remain cognizant of maintaining participant confidentiality. This is particularly important when researching sensitive topics. In order to understand the co-researchers' experiences within interfaith dialogue, I requested information about their personal backgrounds and religious beliefs. For participants to be comfortable in disclosing such information, researchers must have a clear and organized system to maintain confidentiality that the participants trust.

For this study, I sanitized all data before sharing them to ensure confidentiality. To sanitize data, I used pseudonyms for proper nouns such as names of people and places. At other times I removed these from the transcript or fieldnotes and simply indicated that it was a location or a name of an individual or group in brackets that was missing from the text. I did this sanitization during the process of writing my complete field notes and checking the transcriptions against the audio file for accuracy. Once sanitized, I shared field notes with any participant interested in seeing them, whether they were a co-researcher or not. I shared interview transcripts with the individual with whom I conducted the interview. I shared preliminary analysis, drafts of each chapter, and the final report with each co-researcher. This was an extensive amount of material that the co-researchers had the opportunity to review and many would send email replies with detailed feedback suggesting edits or requests for clarity. I shared the documents in a piecemeal fashion, keeping in mind that one large amount of data, notes, and analysis could lead to an overload of information (Bindels et al., 2014).

In addition to the changes to the plan for member checking, I began to discuss data as they were generated throughout the project. For instance, during steering committee meetings we would examine the process of the project and next steps for data generation at upcoming meetings. I would also pose questions to the co-researchers that I had based on my observations which often led to corrections of incorrect assumptions I had made in my fieldnotes, corrections that were invaluable to the research project. I kept memos based on these conversations and incorporated these into my data set.

Finally, I made changes to planning and scheduling based on the involvement of the co-researchers. For interviews, I had planned on choosing the location of interviews and offering several options of times and dates for participants to choose from based on their preferences. However, as they became more involved and our relationships deepened, the co-researchers determined the location, dates, and times of all interviews. The co-researchers who were steering committee members also helped with recruitment for the interviews. As steering committee members, these seven co-researchers were the best choices for interviewing as they were some of the most involved participants in the study group and several of them had been participants since its inception. However, the other individuals I contacted to be interview participants were identified by the co-researchers based on interview criteria I gave. Two of these individuals contacted agreed to participate in interviews and became co-researchers throughout the course of the study as well. Finally, the co-researchers determined the length of the focus group meeting held with the steering committee members. I had originally planned a 45-60 minute session. However, based on the questions on the focus group guide, which I shared before the session, we determined that 60-90 minutes would lead to more detailed and robust data for the study.

Data Analysis

The fourth area of modification, and perhaps the most profound, was in the data analysis process. According to much of the literature discussed above, data analysis is one area in which co-researchers should be heavily involved. For this project, I held an in-person member checking session with all nine co-researchers designed for collaborative data analysis. I brought an outline that included diagrams of the preliminary findings for each research question to this session. I focused this analysis on more than just the accuracy of data and initial interpretations; the two-hour long in-person member checking session was a dialogue during which we collaboratively created what we saw as the final analysis.

In discussing findings for each research questions, the co-researchers first identified areas that needed further elaboration and focus. For example, in my findings for my second research question I identified various roles the facilitators would take on to promote and guide the conversation during dialogue meetings. The co-researchers requested more clarification of these roles in the findings, with better examples from the data and a change in the names of the roles to more accurately represent what they saw themselves doing. Second, the co-researchers confirmed and identified new areas of import in the findings. For instance, in this study, the co-researchers felt that a major outcome of interfaith dialogue is to collaboratively create a counternarrative where they confront stereotypes and misconceptions about Judaism, Christianity, and especially Islam. I originally organized the findings for my third research question with this as a minor point. Upon their recommendations this became a much larger focal point in the final report. These suggested edits to helped ensure the findings were presented in a way that most accurately captured their experience. According to Boylorn (2008), a dialogue between co-researchers and the primary researcher such as this is integral for them to “offer their own interpretation of the researcher’s findings, [voice] their opinion and response to the researcher, [and] thereby [give] voice to the community or group being researched” (p. 600).

The continuous member checking process that culminated in the extensive analysis meeting offered an ongoing way to practice reflexivity, both for myself and the co-researchers during data generation and analysis (Smith, 1994). Smith (1994) explained that when this is done, co-researchers are able to “contribute to a considerable enriching of the researcher’s original reading” which in turn better utilizes the “interpretive resources of the participant” to contribute to the project (p. 259). When a researcher offers the opportunity to review and

discuss not only transcripts and/or fieldnotes, but also the preliminary analysis examining the meaning of such, researchers and co-researchers alike are confronted with the opportunity for further reflection and deeper interrogation of data. As Smith (1994) notes, the interpretations of the researcher are “confronted, modified and honed during this process” (p. 259).

This joint re-examination of the data and a researcher’s interpretations of them can lead to a more robust analysis. The member checking session in which my co-researchers corrected, questioned, and elaborated upon my initial preliminary analysis required me to interrogate my own subjectivity which guided what stood out the most to me in the data and why. I was forced to reflect upon my analytical decisions to at times put aside what I thought demonstrated their experience in favor of what they believed did so. Co-researchers practiced reflexivity when confronted with my interpretations of their experiences. The preliminary findings offered explanations that both resonated with them in unexpected ways and required that they re-examine their initial assumptions of the meaning of their experiences. Additionally, listening to the analytical suggestions of their peers allowed them to reflect upon their experiences in a collaborative and generative way. They were able to point out areas of agreement, debate the meaning of data points upon which they disagreed, and discuss vulnerable moments they still struggle with which they shared with me during data generation.

Presentation of Findings

Because of their participation in the analysis process, I gained a greater understanding of the phenomena of study. By sharing their reflections of the data, the co-researchers offered an opportunity for me to more deeply understand their experiences that were the focus of the project. In both concept refinement and in editing writing, they directly influenced how I presented the findings in the final report. These contributions included word usage for themes, visual presentation of images and diagrams, determination of quotes from the data to use as examples and evidence of findings, and areas of emphasis when preparing the discussion of the meaning and outcomes of their participation in the group under study.

To achieve this, I shared drafts of the final report through email with all co-researchers with the invitation to edit, react, and provide feedback on each draft. For example, having written a case study, one of the chapters of my dissertation was a context chapter that included a narrative of a “typical” meeting based off my observation fieldnotes and a history of the organization. Co-researchers checked this narrative for accuracy based on their own experiences of the meetings from which it was created. In reading both the narrative and the presented history of the group they paid attention to the details in the writing, suggesting adjustments as necessary. Reviewing a dissertation is an extensive process, and in this case the chapters they reviewed totaled to 121 pages in the final report. The feedback I received on these chapters was more extensive from some co-researchers than others, each differing on the involvement they wanted to have in the editing process.

Conclusions

The alterations I made to my dissertation project based on the gradual incorporation of co-researchers could be informative to novice researchers. Changes like these to any research project can lead to feelings of fear and uncertainty and a feeling of pressure for flexibility in a research plan. It could benefit novice researchers to learn to be aware of noting when such changes are necessary and be both willing and confident enough to enact them as they may lead to stronger research. I learned that making modifications to a research project does not mean that the project was bad or failed. Research is often fluid and changing. What a researcher plans may not live up to the reality of the field. Particularly important in qualitative research,

and reflected in the literature discussed above, is that at times, in order for a project to be successful, a researcher may need to cede control and power to the participants.

In qualitative research, there is a great need to develop trust and good relationships through transparency with participants. This trust supports rapport between researcher and participant, which must be nurtured throughout the course of a study. Without good relationships between myself and my co-researchers, this inquiry would have been much shallower, a fact that is supported by the literature discussed above. The depth of the analysis was due to my ability to be responsive in research and flexible enough to be open to the participants taking on the co-researcher role. Responsiveness, particularly in its relationship to reflexivity, requires the researcher to adapt for the benefit of the project.

Behavior and plans I had anticipated would be adequate in the field were inadequate because of the level of involvement the participants wished to have. Responsiveness in this project meant the participants needed a more active role than I had originally planned, which required me to be secure enough to take a back seat in certain areas. By loosening my control on the project somewhat, I became more responsive and my co-researchers and I were able to generate knowledge and rich interpretations of the data and from their experiences. Co-researchers can offer a depth of knowledge about their experiences not readily available from participants by being involved in data generation and analysis.

Researchers must have confidence and trust in themselves and their abilities as a researcher to be able to recognize and implement necessary changes. In this project, I needed to trust both the co-researchers and myself, similar to how the co-researchers needed to trust me. Additionally, this project shows that participatory research designs and other projects employing co-researchers could have a powerful role to play in research on interfaith dialogue. In research on this topic, and possibly other sensitive topics, insider perspectives on both the activities and outcomes of such organizations lead to deeper understandings groups. The reflexive nature of projects with co-researchers can have profound impacts on the co-researchers and the organization itself.

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