The Role of Emotions in Qualitative Analysis: Researchers’ Perspectives

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Abstract
Qualitative research is an inherently social and relational endeavor that relies on and engages our emotions. Yet, researchers receive little guidance on how to engage emotions without being swayed by personal biases. Lustick (2021) developed a framework called "emotion coding" for systematically engaging thoughts and emotions in qualitative data analysis by asking what a chunk of data can teach us about ourselves, our participants, and our study. In this study, we interviewed 15 researchers who had tried using the emotion coding technique, about their impressions of this technique and the role of emotion in qualitative research overall. Framed by Goffman and Hochschild’s theories of emotion work, we find that emotions play a key role in researchers’ decisions throughout the research process, but that researchers are more likely to engage in emotion work (adjusting their feelings) when they perceive their participants hold a different level of privilege than they do. Emotion coding was a useful way to be more aware of their emotions and more intentional about how these emotions influence their findings and design decisions. We discuss implications for qualitative methodology.

Keywords
reflexivity, positionality, qualitative research, emotions, emotion work

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Qualitative research is an inherently social and relational endeavor that relies on and engages our emotions. Yet, researchers receive little guidance on how to engage emotions without being swayed by personal biases. Lustick (2021) developed a framework called “emotion coding” for systematically engaging thoughts and emotions in qualitative data analysis by asking what a chunk of data can teach us about ourselves, our participants, and our study. In this study, we interviewed 15 researchers who had tried using the emotion coding technique, about their impressions of this technique and the role of emotion in qualitative research overall. Framed by Goffman and Hochschild’s theories of emotion work, we find that emotions play a key role in researchers’ decisions throughout the research process, but that researchers are more likely to engage in emotion work (adjusting their feelings) when they perceive their participants hold a different level of privilege than they do. Emotion coding was a useful way to be more aware of their emotions and more intentional about how these emotions influence their findings and design decisions. We discuss implications for qualitative methodology.

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Introduction

Johnny Saldaña (2018) opened his keynote address to The Qualitative Report with an imperative: for qualitative researchers to understand our emotions and thoughts in response to the data. Empirically, we know little about what role emotions play qualitative research, let alone how this role is mediated by myriad cultural, social, cognitive, linguistic, and other factors that influence those emotions and how we experience them. The current study aims to understand the role of emotions in qualitative research, from the perspective of qualitative researchers.

Objective and Rationale

We interviewed 15 qualitative researchers to understand (1) the role emotion plays in their research and (2) their impressions of one technique for using emotions as data (Lustick, 2021). We predicate our study on Ekman’s (1992) assertion that emotion is a universally human feature (Ekman, 1992). Understanding the role emotion plays in qualitative research can help inform how we prepare future researchers to manage their emotions in qualitative research, both to support their development as reflexive researchers and sustain them as human beings doing emotionally intensive work. The following literature review provides a background on the topic of reflexivity, noting that this literature does not prescribe methods for managing emotions as part of reflexivity.
Emotions in Reflexivity: Conventional and Critical Approaches

This section maps the literature on emotions and reflexivity, highlighting a significant gap in this literature: authors consistently acknowledge the importance of emotion as a general part of reflexivity, but do not specify what this practically means for the research process. Common doctoral textbooks in qualitative research define “reflexivity” as how the researcher “positions themselves in a qualitative study” (Creswell & Poth, 2018, p. 44). This position includes their beliefs and emotions about the research topic (Savin-Baden & Howell Major, 2013, p. 38). Lofland and Lofland (1995) note that the qualitative researcher is an instrument for data collection and analysis. They describe reflexivity as the process of clearing away smudges on the lens of that instrument: beliefs, emotions, and other biases can cloud our ability to clearly view our subject.

However, not all scholars agree that an emotion is analogous to a smudge on an otherwise clear view of the world. Nina Baur (2021) acknowledges that, while we can never be entirely rid of our thoughts and emotions, we can notice them and even draw on them as sources of knowledge. “The emotional reaction…can be turned into an analytical advantage once one starts asking, ‘Why am I acting emotional here? What blind spot was hit?’” (Baur, 2021, p. 226). Interrogating one’s reactions for more information is part of what Mao et al. (2016) call “critical reflexivity”: “a form of researcher critical consciousness that is constant and dynamic in a complex spiral-like process starting within our own experiences as racialized, gendered, and classed beings embedded in particular sociopolitical contexts” (p. 1). The “spiral” metaphorically refers to a social practice the authors used to share their dissertation progress and provide feedback, moving continuously from personal experience to method and back again to drill into deeper understandings of the data and their own critical consciousness.

Chesney (2001) describes how tracking her emotions aided, rather than detracted from, her ethnographic research on new mothers in Pakistan. For example, she recalled feeling “comforted” when she realized her participants had acclimated to her presence enough to not notice her anymore. “This was not a source of danger,” she wrote, “but a rich source of information; the acceptance and fitting in of the real me advanced the research considerably” (Chesney, 2001, p. 9). Traditionally, emotions are a source of data that the academy does not consider reliable information (Nutov, 2017). Hordge-Freeman (2018) writes that “overlooked sources of data are like marginalized voices.” She writes that it is the researcher’s responsibility to “identify and pursue ‘sensitizing concepts,’ examine the critical relationships among our respondents, and engage with our social environments in ways that marshal our unique expertise and emotional experiences, to move us closer to constantly evolving ‘insights’” (p. 2). These scholars push conventional notions of reflexivity by encouraging us to examine our beliefs for dominant assumptions that, if unchecked, confine our analysis within the White, European, hetero-, male-centered paradigm (Chesney, 2001; Matias et al., 2017).

Reflexivity Without Self-Obsession

Kobayashi (2003) criticized critical reflexivity as “self-obsessive” and unproductive. She recommends that critical reflection serve a broader purpose beyond self-understanding. Dean (2021) similarly remarked, “Reflexively checking your privilege is not an end in itself, but a key methodological tool in understanding how one’s gaze may affect the data one gathers and the interpretations one makes” (p. 183). An effective approach to critical reflexivity, then, is one that empowers us to recognize and challenge our biases in service of critical scholarship—not in service of self-scrutiny or self-discovery.

Robin DiAngelo (2018) discusses how White people tend to focus more on their emotions about racism than racism itself, as a way of avoiding the difficult and humbling work
of acknowledging their complicit role in promoting White supremacy. To keep White fragility from interfering with qualitative research particularly, Matias (2016) encourages White researchers to interrogate the emotions racism brings up as part of cultivating critical reflexivity.

One gap in the literature is technique: we have little research on what methods researchers use to systematically remain conscious of their emotions and identities while in the process of collecting, analyzing, and writing about data. As the next section demonstrates, methodologists who have written about the role of emotion in research tend to speak generally about the value of emotions without proposing specific methods for the role emotion can play in research (Oplatka, 2018; Saldaña, 2018).

Gaps in the Literature: Methods for Engaging Emotion in Critical Reflexivity

Qualitative methodologists who study the role of emotion in research (Oplatka, 2018; Saldaña, 2018) posit that examining emotions (both ours and those of our participants) is crucial to data collection. Yet, discussions of how to do this remain anecdotal, sharing one’s own process, rather than laying out a technique for the purposes of teaching other researchers (Lustick, 2021). For example, Mao et al. (2016) described what realizations arose from sharing their data with each other but did not describe how other researchers might set up a similar group. Chesney (2001) talked about what she gleaned by acknowledging the sense of comfort she had speaking to some of her research subjects but does not provide details on how others might engage in a similar process of reflection. Oplatka (2018) proposes that educational researchers be willing to express their emotional reactions during the semi structured interview process, suggesting that this “dynamic allows the interviewer and the interviewee to create a dialogue in which emotions are transferred verbally and silently through body language and, thereby, may create an atmosphere that facilitates, and even encourages, the interviewee to talk about his/her own emotions and feelings” (Oplatka, 2018, p. 1347). However, he does not specify how interviewers can create that atmosphere.

Saldaña (2018) lists attributes that help him integrate emotion and cognition in his qualitative research but does not describe how the researcher would incorporate this list into their analysis process. Lustick (2021) proposed one technique for emotion coding as a method of critical reflexivity (See Figures 1 and 2).

Figure 1
A Proposed Framework for Emotional Coding

Note. Reprinted with permission (Lustick, 2021).
The emotion coding technique can be summarized as follows:

1. Read through a qualitative data set, such as an interview transcript or set of fieldnotes. When a strong emotion or thought arises, annotate this in the text (e.g., as a “comment”).
2. For each chunk of text where you provided such a comment, answer the following three questions. Note that each question builds on the answer to the question preceding it.
   a. What strong thoughts or emotions does this chunk of data bring up?
   b. What do these thoughts or feelings tell you about yourself, as a person and as a researcher?
   c. What do these thoughts or feelings tell you about your participant?
   d. What do these thoughts or feelings tell you about your project overall?

The emotion coding technique allowed Lustick to engage the emotional component of critical reflexivity that Matias (2016) recommends for White educational researchers: the ability to hold empathy for one’s participant while also remembering one’s privilege and responsibility as a White researcher. Lustick (2021) invoked Hochschild’s (1983) theory of “emotion work” to explain the role emotions play in critical reflexivity: “There is the external work of showing empathy to our participants, and the internal work of acknowledging our compliance in larger systems of oppression” (p. 16). This concept of emotion work frames our current inquiry, as we ask other researchers to reflect on the role of emotion in their research.

**Conceptual Framework**

Critical reflexivity demands that the researcher be able to both empathize with the participant and acknowledge their own perspective. Yet Hochschild (1983) notes a thin line between displaying empathy, which she calls “surface acting” (p. 55) and what she calls “deep acting,” where we forget our separateness and take on the emotions of the person we are
empathizing with (p. 55). Deep acting is antithetical to critical reflexivity since the latter requires the researcher to remain aware of their positionality even while empathizing with another.

Hochschild (1983) argued that any profession involving human interaction, such as teaching, nursing, or flight attendance, requires emotional work (Goffman, 1961). She acknowledges that we can shift in and out of deep and surface acting from moment to moment. We argue that qualitative research is a client-facing profession. Reflexivity requires one to remain empathic without slipping into deep acting: to maintain a strong internal boundary between their own emotional life and that of the participant. Interviews, focus groups, observations, and other people-facing qualitative research methods all require social interaction in which a person could employ surface acting, deep acting, empathy, or a combination of these. These concepts allow us to gauge our participants’ capacity to remain reflexive, empathic, self-aware researchers.

**Methods**

This study drew on interviews with 15 qualitative researchers to address the following research questions:

1. What is the role of emotion in qualitative research?
   a. What kinds of emotions have researchers experienced, and how do they respond to them, both in the moment and later?
2. What were these researchers’ impressions of the emotion coding technique (Lustick, 2021)?
   a. Do they believe this technique should be part of reflexivity training in qualitative research? If so, how, if at all, can it be improved?
   b. Given that emotional experience is mediated by a range of cultural, gender, and linguistic factors, what feedback do they have for making the technique more relevant and accessible?
3. What role, if any, does emotion work (in the form of deep or surface acting, defined by Hochschild, 1983), play in qualitative research?

Our study occurred in two phases. In Phase I, participants read the first author’s article describing her emotion coding technique, the data collection event (e.g., interview, focus group, etc.) that inspired it, and how it contributed to her understanding of her data as well as herself as a researcher. Participants were provided with instructions for practicing emotion coding on a chunk of their own qualitative data. In Phase II, we interviewed participants regarding the role emotion played in their own research and their impressions of the activity.

**Selection Criteria**

We recruited participants who had experience and training in qualitative research and an interest in trying the emotion coding framework. We defined “training” as having completed a graduate degree in research with at least one qualitative course. Data collection included a survey; emotion coding activity; and interview. In compliance with our institution’s Institutional Review Board, we noted the possible risks that could arise from mining one’s research experience for strong (and potentially difficult) emotions. We warned participants of these risks in our consent materials, and our opening script reminded participants that they could stop the interview at any time should they need to.
Recruitment

We recruited qualitative researchers via targeted emails to colleagues who do qualitative research and a listserv for qualitative researchers in education. The listservs we utilized include industry researchers, faculty members, and graduate students. Respondents filled out a survey which collected demographic information as well as details to help us determine whether they met our selection criteria. Those who were interested, and whose responses fit our criteria, were invited to participate in the next phase of our study. This required them to complete an activity and participate in a Zoom interview.

15 researchers, including current graduate students, professors, and industry researchers, signed up for full participation. Among the participants, 12 (80%) were US citizens whose first language was English. White, US-born, native-English-speaking women comprised our largest subgroup: 60% of all participants. Other nationalities included Brazil, China, and Myanmar. Eight (over 53%) held a doctorate degree. The remaining seven held master’s degrees, with five of them pursuing doctorates at the time of data collection. Table 1 details these individuals while obscuring some details to protect anonymity.

Table 1
Participants’ Demographic (n =15)

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Gender</th>
<th>Nationality</th>
<th>Race/Ethnicity</th>
<th>Occupation (Discipline Where Provided)</th>
<th>Highest Degree Earned</th>
<th>First Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lena</td>
<td>Female</td>
<td>U.S.</td>
<td>White</td>
<td>Assistant Professor (Education)</td>
<td>Ph.D.</td>
<td>English</td>
</tr>
<tr>
<td>Martin</td>
<td>Male</td>
<td>U.S.</td>
<td>Asian</td>
<td>Behavior Analyst/Ph.D. Candidate (Education)</td>
<td>Master’s</td>
<td>English</td>
</tr>
<tr>
<td>Heraldo</td>
<td>Male</td>
<td>Brazil</td>
<td>White</td>
<td>Ph.D. Candidate (Education)</td>
<td>Master’s</td>
<td>Portuguese</td>
</tr>
<tr>
<td>Yuhai</td>
<td>Female</td>
<td>China</td>
<td>Asian</td>
<td>Ph.D. Student (Business)</td>
<td>Master’s</td>
<td>Mandarin</td>
</tr>
<tr>
<td>Tan</td>
<td>Male</td>
<td>Myanmar</td>
<td>Asian</td>
<td>Adjunct Professor/Ph.D. Candidate (Education)</td>
<td>Master’s</td>
<td>Burmese</td>
</tr>
<tr>
<td>Tony</td>
<td>Male</td>
<td>U.S.</td>
<td>White</td>
<td>Ph.D. Candidate (Psychology of Sport)</td>
<td>Ph.D.</td>
<td>English</td>
</tr>
<tr>
<td>Amy</td>
<td>Female</td>
<td>U.S.</td>
<td>White</td>
<td>Postdoctoral Researcher (Education)</td>
<td>Master’s</td>
<td>English</td>
</tr>
<tr>
<td>Hanna</td>
<td>Female</td>
<td>U.S.</td>
<td>White</td>
<td>Postdoctoral Researcher (Education)</td>
<td>Ph.D.</td>
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<tr>
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<td>U.S.</td>
<td>White</td>
<td>Student Affairs Manager/Ph.D. Candidate (Education)</td>
<td>Master’s</td>
<td>English</td>
</tr>
<tr>
<td>Carrie</td>
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</tr>
<tr>
<td>Ada</td>
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<td>White</td>
<td>Adjunct Professor/Ed.D. Candidate (Education)</td>
<td>Master’s</td>
<td>English</td>
</tr>
<tr>
<td>Shira</td>
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<td>White</td>
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<td>Ph.D.</td>
<td>English</td>
</tr>
<tr>
<td>Nina</td>
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<td>White</td>
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<td>English</td>
</tr>
<tr>
<td>Jeannie</td>
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<tr>
<td>Kaitlin</td>
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<td>U.S.</td>
<td>White</td>
<td>Assistant Professor</td>
<td>Ph.D.</td>
<td>English</td>
</tr>
</tbody>
</table>

Eligible individuals who completed the survey and indicated an interest in the full study received an email with (1) A copy of the article that proposed emotion coding as a technique for using emotions as data (Lustick, 2021), (2) Instructions for using the emotion coding
technique to analyze a chunk of qualitative data and reflect on this process (See Appendix for instructions), and (3) A set of interview dates and times to choose from.

**Phase I: Reading About and Practicing Emotion Coding**

We sent the theoretical piece (Lustick, 2021) to participants, and asked them to read it. Next, we asked them to identify an excerpt from some qualitative data they had collected previously, such as an interview or observation, and then list what feelings this excerpt elicited. This could be data from a current or past project. The exercise led participants through the components of the framework.

Ten of our 15 participants completed the exercise prior to the interview. Those who did complete the process noted that it took them longer than they had expected. Given that we were conducting our research without offers of compensation, during a worldwide pandemic, when so many were working from home without adequate childcare reasonable accommodation that would significantly alter our results, we decided not to exclude participants who could not complete the reading and exercise. Part of the interview protocol, for all participants, was to have them share detailed experiences with emotion coding. Since we conducted interviews over Zoom and participants were on their computers already, those who did not complete the exercise in advance were able to open a qualitative transcript in the moment and identify a chunk of data on which to practice the technique. We guided participants through the instructions in real-time, and then solicited their reflections.

**Phase II: Interviews**

The PI and research assistants conducted and recorded interviews over Zoom. Each interview was conducted by one of us. Each of us watched our interview recording and adjusted the Zoom transcription for any mis-recorded words. We also wrote reflective memos about our own interviews.

The interview began with an overview of participants’ experiences with qualitative research. To gauge their baseline familiarity with positionality and reflexivity, we asked them if they regularly wrote memos or journal entries about their research. We led participants through a series of questions that delved gradually into their comfort level, awareness of, and practice using emotions in the process of collecting and analyzing qualitative data. This process reflects Rubin and Rubin’s (1995) recommendation for semi-structured interviews, in which questions start out more superficial and move gradually into the core questions of the study. In addition to this gradual approach, we wanted to ease participants back into their memories of a moment when strong emotions about research arose.

As an entry point, participants shared what drew them to learning about and using qualitative methods in their work, as well as any practices they had for reflexivity, such as memoing or journaling. We then shifted into questions about emotions in research: first their experiences with this in general, and then their impressions of the framework. While our main questions were about what they did with their emotions, we did not start out asking this: Instead, we asked a series of questions to prime their memories of the emotion. We asked them to share a bit about their research (which we do not report, to protect anonymity); what emotions it made them feel; how strongly they would rate these emotions on a scale of “low,” “medium,” or “high,” and at what stage of the research process the feelings occurred (such as design, data collection, analysis, or write-up).

Once participants were reacquainted with their emotions and the experience that evoked them, we moved into the questions that were more connected to our first research question: What is the role of emotion in qualitative research? We asked participants whether they
expressed their emotions in the moment or later, and how they did so. Next, we moved to questions for soliciting their impressions of the emotion coding technique. Whether or not they completed the emotion coding exercise, they were asked to identify an excerpt of original qualitative data that elicited a strong emotion; identify this emotion to the best of their ability; and reflect on what this emotion might be telling them about themselves, the participant, or the phenomenon under study. As part of this line of questioning, we encouraged participants to reflect personally on why they were having the emotional reactions they were having, and to what extent these reactions might be linked to the values and attitudes toward emotion with which they grew up. We closed by addressing our second research question: asking for feedback on the instructions they had received.

Analysis

Researchers wrote memos after each interview to capture initial thoughts and reflections. Employing the emotion coding technique ourselves, we also read through the transcripts and used these memos to note strong thoughts or feelings that the transcripts brought up for us. After completing all interviews, transcripts were loaded into NVivo and coded according to a combination of \textit{a priori} and inductive coding. First, we coded all data descriptively, while also capturing moments when participants described surface or deep acting, according to Hochschild’s (1983) definitions. In a second cycle, we engaged in a process of synthesizing (Saldaña, 2018). We re-read all data and identified similarities across codes. These similar codes were combined into a smaller list of codes. In a third cycle of coding, we noted patterns across codes. These patterns became our themes: the main findings of our study.

Positionality

The researchers are three cis women in our 30s or 40s: a PI and two Ph.D. candidates at the same university. Hilary, the PI, is a White Jewish woman. She approaches this research as a qualitative researcher who, as discussed in the previous section, has developed, and published a framework for analyzing strong emotions during the research process, and using them to inform critical reflexivity. She brings to this study the assumption that our emotions are a source of valuable data, and that if we have a systematic way of examining them, they can inform and enrich our overall data analysis as well as our continual development as critical researchers. The questions she has found useful to help her examine her emotions are presented in Figure 1.

All three of us had used the emotion coding framework on our own data before beginning the project. As we all came from three very different backgrounds in terms of nationality (Chinese, Jordanian, American), ethnicities (two White and one Chinese) religions (Jewish, Muslim, Atheist), and language traditions, we soon acknowledged how much our backgrounds influenced our experience of and relationship to our emotions. We therefore believe it is worthwhile to seek feedback on the emotion coding framework from others to improve it as a tool. We also acknowledge that these beliefs may create blind spots, so we remained open and reflective about the feedback we received.

Three of the participants were former graduate students of the PI, from her work at a different institution. She was not on any of their dissertation committees or otherwise connected to the research they reflected on in the study. However, another member of the research team interviewed this participant, rather than the PI.
Findings

Because our participants were researchers themselves, this section refers to them as researchers, and their participants as “participants.” Overall, we found that researchers experience strong emotions during qualitative research but are not always conscious of these emotions or the role they play. Emotion coding helped them be more conscious and intentional about how they incorporated emotional impressions into their findings and future research design. Three themes in our data support this overall finding.

**Finding #1: Researchers Engaged in Emotion Work to Downplay Privilege**

Emotion work was evident in researchers’ descriptions of mirroring their participants’ emotions (surface acting), and, in one case, experiencing those emotions (deep acting). Emotion work was especially evident in researchers who considered themselves to have privilege (such as White privilege or linguistic privilege) compared to their own research population. To avoid accentuating the difference between their privileged life experiences and those of their participants, the researchers in our study talked about needing to “play down” the strong emotions of surprise, anger, or injustice they felt in response to hearing about participants’ everyday experiences with discrimination and marginalization.

In her study of masculinity at an American high school, C. J. Pascoe (2005) donned casual clothes and led with a younger, more masculine side of her personality so that young men would trust and relate to her. Pascoe referred to this as a “least adult” presentation: playing down the part of one’s identity that would otherwise create too much of a power differential to allow for human connection between researcher and participant. Some of our White participants perceived that “playing down” their emotions were a way of “playing down” their privilege, and that this was desirable for conducting research with marginalized populations.

Tan, a member of the language majority in his home country of Myanmar, conducted a research project interviewing members of the minority language community. Tan reports feeling “empathy,” but when asked what he was empathizing with, he talks about his own guilt about being in the language majority: “Maybe empathy, as a language minority. You know, I’m from the majority group. And then that feeling of, you know, the government is from the majority group. It is not fair, and I probably cannot do much about it.”

When described this way, empathy seems to serve a similar purpose to surface acting: it allowed Tan to own his emotional reactions while creating a space for participants’ emotions. As we further detail in our section on the role of emotions in research, “empathy” was one of the emotions researchers most named, and their description of it resonated with the concept of surface acting.

Jeannie, a White researcher who studies the experiences of Black women in the workplace, described the “privileged shock” she feels when she hears about the microaggressions these women routinely face: “I think surprise is not the right word, but I think I have a naivete, a kind of privileged naivete about what’s really happening. And my disappointment never ceases, which suggests that I think something better might happen.” Jeannie perceived her disappointment and shock about microaggressions as signs of her own naivete. While she demonstrated empathy for her participants, she described this as a muted version of her actual feelings: “I say things like, ‘Wow, that sounds so upsetting and devastating, you know, I can tell you’re really upset by that and that was very painful for you.’” Jeannie explains that, if she were speaking naturally, she might say “like, ‘Wow, those people are as*holes.’” Other times, she might feel herself beginning to cry. However, Jeannie repressed these inclinations, believing a strong outburst would burden the participant and detract from their interview.
Jeannie’s reflexivity practice seems to be both a type of surface acting and a way to avoid deep acting. She stated that she writes with “less anger” when her imagined audience includes Black readers. When she engages in member-checking—sharing her work with participants—she sees it in part as an opportunity to ensure she is not ladening too much of her own anger onto her depiction of her participants. When she is writing for a mostly White audience, such as an op-ed that she imagines will be read by mostly white liberals, Jeannie allows her anger to come through, because she feels freer to write from her own point of view as a white person angry about racial injustice. It is only when she is attempting to capture the feelings and experiences of her participants that she feels she must put her feelings aside.

Carrie, who identified as white and upper middle class, balanced “crying” with “trying to be nurturing” toward her participants as she conducted interviews on how COVID impacted public service access. Like Jeannie, Carrie balanced her desire to connect with her participants with her awareness that, as a person with relative privilege, she did not want to let on as though she could truly understand her participants’ experiences.

Tony, a White male researcher, felt pride and admiration when he interviewed a Black female soccer referee, noting how difficult that field is for women. He says he was careful to hold back on expressing his pride, however, because he was aware it could come across as patronizing.

Tony perceived his participant might have “preconceived notions” of research and what the “boundaries” should be between “men and women.” By keeping his pride and admiration to himself, he believed he could avoid crossing those boundaries and making her uncomfortable. He did, eventually, share his admiration with this participant, after she attended a focus group and they had more of a chance to get to know each other. However, during the interview, he kept his feelings at bay by exhibiting what he called the “classic counseling technique” of “reflecting back” whatever the participant is expressing. Mirroring another’s emotions is an element of surface acting: a type of emotion work.

Ada, a white educational researcher, described playing down her emotions about racism with other white people. Ada led an antiracism workshop over Zoom for parents of school-aged students that doubled as data collection for her dissertation. She recalled a parent’s “racist outburst” and subsequent departure from her workshop. Ada reported having felt negative emotions about the event and the racism it surfaced, but also some pride at being able to hold an antiracist workshop that was sufficiently provocative to bring that parent’s racism to the surface. She did not believe either of these emotions was appropriate to the workshop itself, however, and so continued without demonstrating any reaction to the episode at all.

Evidence of deep acting only arose with one participant. Carrie described experiencing “secondary trauma” from some of her interviews, and shared that she engaged in self-harm and other destructive behaviors until she was able to find a “place to put” her emotions. Now, after an emotionally difficult interview, she processes her feelings through journaling or voice memoing.

**Finding #2: Researchers Confused “Empathy” with Emotional Reactions to Participants**

60% of participants named “empathy” as the strongest emotion they felt during their research. In these cases, we would acknowledge that empathy is not an emotion, and probe
further for an emotion, (e.g., “What emotion are you empathizing with?”), researchers would usually share an emotion that they (the researcher) felt about what they were hearing from the participant—not what emotion they imagined the participant was feeling. This conflation is like surface acting, in that empathy requires one to distinguish between one’s own emotions and the emotions of their participant.

This term, Empathy, was more widespread in our interviews than surface or deep acting, and we grappled with whether to treat it as evidence of emotion work. Scholarship on empathy is ambivalent as to whether it is synonymous with surface acting. Cognitive neuroscientists define “empathy” as a complex neurological and cognitive skill (Riess, 2017). By this definition, empathy is the ability to detect another’s emotions, resonate with them, and understand their perspective. Unlike emotion work, in which we perform or even take on the emotions we believe our profession demands of us, empathy requires us to “distinguish between our emotions and the emotions of others” (Riess, 2017, p. 74). On the other hand, Kim (2018) conflates empathy and surface acting. Kim recommends surface acting as a natural part of the “embodied empathy,” nurses need to care for their patients without suffering burnout (Kim, 2018, p. 1084).

Like Kim (2018), the researchers in our study experienced empathy in an embodied way. However, the emotion they embodied was not necessarily one they were picking up from a participant. In our interviews, “empathy” referred to one’s own reaction to the content of the interview. We also noted that empathy seemed to serve a different purpose than surface acting; participants did not use empathy to “play down” their emotions. To the contrary, researchers described empathy as a means of maintaining enough emotional distance to connect with their participants without losing their sense of themselves.

Tony expressed “compassion” for the “frustrations” his participant faced as a female referee in a sports industry whose systematic limitations on women are “significant.” Tan empathized with his participants’ anger and the discrimination they described. Nina empathized with an autistic participant; as the mother of an autistic child, she felt she could relate to the struggles he described. Lena expressed feeling empathy when a mouse appeared in the classroom during her interview with a school principal, because the principal seemed unphased and referred to this as a common occurrence in their run-down school. She said she picked up on a kind of “resigned anger” or “disappointment” from this principal, and that this made her angry, too. In these examples, we saw researchers using the word “empathy” to describe an emotion state that either matched their participants’ or how they imagined they themselves would feel in their participants’ place. By contrast, Jeannie described empathy as creating a “safe space” for her participants. Shira described herself, blanketly, as an empath: “I’m somebody who feels the emotions of others.” Each of these is an accurate representation of empathy according to Reiss’s (2017) definition. In these cases, empathy functioned like surface acting, allowing participants to be emotionally present with their participants while recognizing themselves as separate.

Finding #3: Emotions Influence Findings, Design, and Future Research

All the researchers in our study reported strong emotions at some point during the research process, most often during data collection. Negative emotions they suppressed included anger, frustration, sadness, helplessness, despair, embarrassment, and disgust. Positive emotions, like pride or “a sense of honor,” were rarer, as were neutral feelings such as curiosity or confusion, but researchers also reported suppressing these. Each of them reported having to work consciously to hide these emotions during data collection, feeling them most strongly right after they left the data collection site or later during analysis and report-writing.
Selena, who studies teacher education, “fidgeted under the table” and “smiled when appropriate” during an interview with a teacher education student whose anecdotes suggested a lack of respect for and understanding of her students. Tony engaged in what he called the “classic counseling behavior” of reflecting or mirroring his participants’ expressions. Yuhai, a business student, was interviewing users of a social media platform, when one of them mentioned the deep loneliness, she was experiencing; Yuhai offered some perfunctory words of comfort but did not betray how concerned this news made her feel on her participant’s behalf.

Researchers who reported any emotional processing typically did so after data collection and before analysis. While 10 of them engaged in some sort of journaling or memoing practice, most also talked to a colleague, partner, or friends. “My wife could testify to you that I probably went on a rant about how angry it made me,” Martin said, recalling an observation of a disciplinary process with an autistic student in which the student was grossly disrespected by teachers and classmates.

Finding #4: Emotions Guided Research Findings and Future Research

Upon reflection, researchers noted their emotions drove the idea they decided to focus on in their report or future research. When a White parent left her antiracism workshop, Ada felt “validated.” She did not realize it consciously at the time, but upon reflection in the interview, she surmised this feeling of validation may have contributed to her decision to pursue antiracist education for parents as a research topic in the future. Carrie noted that the strong emotions arising from a focus group with students helped her write a compelling report that earned buy-in from the community and funding for an intervention. Tony’s strong sense of frustration for his participant, and pride in her persistence, inspired him to incorporate her story into the vignette he created (Colucci, 2007) for a follow-up focus group. Jeannie acknowledged that emotion played a continuous role in her development as a researcher. Her sense of “privileged shock” and disappointment in that shock, prompted a process of reflection that influences her overall research agenda, career, and life. Jeannie felt motivated by her participants’ “bravery” to take more risks:

I think, for me, those kinds of experiences make me feel brave to activate myself in other spaces, because I see these women or my participants, not even that others who show such incredible poise and courage in the face of a foot on their neck.

Including Jeannie, ten of the researchers in our study reported that their emotions drove the idea they decided to focus on for future study or the findings around which they structured their report. Using the framework made participants more aware of the ways these emotions informed their findings and subsequent research. The framework seemed to make the implicit, explicit, giving them a systematic process for understanding how emotions were impacting them, their understanding of their participants, and their research overall.

Emotion Coding Deepened Awareness of Self, Research, and Participants

Researchers affirmed that the emotion coding technique enhanced their understanding of their positionality; themselves; their participants; and their overall projects. Five expressed plans to use it again. On the other hand, two found it too emotionally difficult, or felt it was not worth the time it took, especially participants who worked in industry. 13 believed it was useful
for training in qualitative methods and should be part of graduate student education in qualitative research methods.

**Emotion Coding Confirmed and Extended Awareness of Positionality**

Positionality describes the researcher’s personal perspectives, experiences, and emotional connection to their research topic (Breuer, 2021). Reflexivity is the ability to reflect on positionality and develop methods for confronting potential biases and blind spots (Mao et al., 2016). In case they were unfamiliar, and to ensure everyone we spoke with was operating on the same general definitions, our interview protocol included these brief definitions of positionality and reflexivity.

Most of our participants were familiar with these core aspects of qualitative research, and talked about how the emotion coding technique enhanced or reinforced what they already knew about their positionality. Kaitlin and Jeannie, who already had robust processes for journaling and memoing, were able to confirm and add nuance to their privilege and blind spots. Heather, an industry researcher who evaluates curriculum implementation, was used to writing her positionality into her report in terms of her background. The emotion coding technique made her curious to incorporate more emotional awareness into her positionality statements: “not just, like ‘I’ve had this experience before,’ but ‘I’ve had I’ve had experiences like this before, and that makes me feel this way about the data that are the phenomenon that we're studying.” The emotion coding technique helped Heather realize how central a role her emotions played in her data interpretation.

Researchers who were less familiar with positionality and reflexivity were still able to benefit from the technique. Amy, a postdoctoral researcher, did not know the term “positionality” until she encountered it in our study. Once the PI shared this definition, Amy had immediate thoughts on what her emotions tell her about her positionality.

Like us, Amy studied researchers, specifically those who do research that elicits strong emotions. She applied the emotion coding technique to an interview she had conducted with someone who does research on abuse of women and girls in a high-profile industry. She identified strong feelings of inspiration. Her inspiration then helped her connect with her feminist orientations, and this in turn helped her acknowledge potential biases in what type of data she was likely to emphasize in her report and overall findings:

I have a place in my heart for people doing like and like just feminist research in general, so whether it's girls being abused in sport, or you know sexual assault victims or whatever is in that kind of rum, especially to sports like it’s hard to hear and it's really, really…inspiring.

Amy reported that she had never considered herself a feminist before, but when asked to reflect on what her emotions told her about her positionality, she realized:

Everything was just resonating with me more than other participants so that bias to like potentially put more value on people doing research with girls and women in sport is, I might put more value on that than people doing research with young men or boys.

Once Amy became aware of her inspiration and that it was coming from feminist research on abuse, she also became aware that her pull towards feminism might “bias” her. Similarly, Selena acknowledged that her emotions “are probably always going to affect” her, and that she wants to share her feelings and findings with her dissertation committee to ensure the former
is not dictating the latter. This reflection from Selena illustrates that researchers’ deepened sense of positionality and reflexivity were inextricable from emotional awareness. While there were reports of the emotion coding technique deepening emotional awareness, there was also confusion and discomfort in having to identify strong emotions, and participants wanted future iterations of the technique to provide more scaffolding toward identifying and working with strong emotions.

Emotion Coding Heightened Emotional Awareness, Sometimes to a Detrimental Extent

The emotion coding technique presumes the researcher’s ability and willingness to identify and name strong emotions. However, our participants made it clear these are not always safe presumptions. Participants who were deft at acknowledging and articulating their emotions understood that the coding technique could “save time.” As Yuhai put it:

I'm kind of feeling like maybe the emotions can serve as a signal …alert me that here's some point that you should pay more attention and think deeper. It can save me some time…help me to identify which parts are the important parts which parts I should pay more attention to.

Here, Yuhai presumes that the process of identifying and interrogating her emotions will not take extra time or energy. Other researchers, particularly those doing emotionally intensive work, feared that engaging their emotions might make their overall work take longer or would be harmful. Shira reported having to “take a lot of breaks” to get through the emotion coding exercise when she did it on her own, because she was “reading a lot of sensitive stuff that kind of triggered me.” Nina, who works on tight grant deadlines as a program evaluator, said the exercise reminded her why she does not tend to engage with her emotions during the research process: “The things people say in interviews can be really hard and I need to be able to forget about my emotions and detach myself.”

The most repeated feedback we got was to include some kind of resource for identifying and naming emotions. Rather than the technique starting with the question “What strong thoughts and emotions do these data bring up,” three of our participants suggested we provide a list of possible emotions to choose from. “I wonder how emotions are being defined?” Ada asked. She acknowledged that she is a native English speaker, but still struggled to articulate her emotions as she responded to the exercise. Amy noted that “different countries define emotions in different ways,” and that people from different cultures “will interpret emotions in lots of different ways.” Heather felt she needed more questions to guide her from identifying her own emotions toward describing what these emotions told her about her data, because she struggled to answer both questions. Heraldo, who is Latin American, Martin, who is half Japanese, and Tony, who is British, each noted that their cultural backgrounds made it difficult to reflect on their emotions, as they had been discouraged from expressing strong emotions (even to themselves) from an early age. Heraldo suggested including examples from researchers of different cultures:

Heraldo: One thing that thinking from a more broad cultural perspective because the experience that you report, and what generates the framework, later on, they are very much embed that in the US culture, perhaps, if you could bring what diverse experiences in other cultural environments, what would be other possible emotions that could happen in other environments, that would still be emotion and the framework would still be useful to tackle them, but perhaps
incorporate other examples of possible examples of emotions that can can play in the research process.

PI: Maybe presenting a framework in a way that includes examples, besides just one from my perception but other people’s experiences.

Heraldo: Uhmmmm [affirmative]

Speaking directly to the PI, who wrote the framework article, Heraldo emphasizes that the only example he has of the emotion coding technique is from a US-based researcher. He senses that reading examples from researchers of cultures more like his might not only help him learn to do the exercise but could make the practice of identifying and sharing emotions feel more relevant.

Heraldo and Jeannie, who did not report any issues identifying her emotions, took issue with our emphasis on “strong” emotions, noting that they were informed by a host of emotional data—not just the emotions they felt most “strongly.” For example, Heraldo was frustrated when his participants—all CEOs of major corporations—were uninformed about business ethics, but he also reported feeling “happy” to discover this, as it meant his research was necessary. Both these feelings were relatively mild, but they motivated him equally to continue this path of inquiry. Jeannie suggested that the emotion coding technique generates a list of all emotions detected, rather than prioritizing “strong” emotions over “weak.”

While participants emphasized the value of emotion coding regardless of their cultural background or relationship to emotions, those who planned to use it again wanted more scaffolding along the way. Whether or not researchers intended to use the framework or engage with their emotions, they recognized that emotion plays a key role in their research process, and that articulating that role (unless it detracts too much from their energy or time) will enhance their findings and future research.

**Emotion Coding is Auxiliary, Not Descriptive**

While none of the researchers stated this explicitly, another piece of feedback we gleaned from our interviews was that our instructions gave the impression that the research should code every bit of text with an emotion code. To the contrary, emotion coding is a technique for auxiliary coding (Saldaña, 2018) that can occur alongside other codes. It is only designed to be applied to chunks of text that cause strong emotion. Confusion in this regard showed we need to provide more explicit detail about the auxiliary nature of emotion coding.

**Discussion**

**The Role of Emotion in Qualitative Research**

The purpose of our study was to understand the role of emotion in qualitative research. The researchers we interviewed reported that emotions play a strong role at every stage of research, informing their decisions, findings, and future research. However, as they testified and we saw, their awareness varied. When researchers were aware of their emotions, they could describe where their emotions came from, how they processed them, and what influence they had on their research. When they were less aware of their emotions, however, researchers labeled them as “empathy” or tried to play them down in front of participants. The latter resulted in emotion work, mostly surface acting, usually to create a safe space for participant emotions. One researcher, Carrie, described what sounded like episodes of deep acting, in
which emotional overwhelm triggered compulsive behavior. Overall, however, our participants, including Carrie, had developed strategies for processing their emotions, or had chosen not to engage with them at all.

**The Role of Emotion Work in Qualitative Research**

Consistent with Lustick’s (2021) experience, our participants described empathy in a way that was consistent with surface acting. The term “empathy” came up frequently in the form of an answer to the question “what emotion did the data bring up for you?” Empathy is not an emotion—it is a complex cognitive skill (Reiss, 2017). Researchers used the term “empathy” to refer to a conflation of their own emotions and those of the participant. Like surface acting, empathy was a way of performing connection that participants felt was necessary for their jobs (qualitative data collection). Unlike surface acting, we can see empathy as a means of creating distance between oneself and one’s emotions about the research. If a researcher says they are feeling “empathy,” they can disavow their own personal emotional reaction to data and avoid interrogating what this emotion may say about them. Without further investigation into participants’ understanding of this word, however, we cannot draw conclusions about the nature of their empathy and whether they were, in fact, surface acting. Future research might investigate the difference between these two, for the purpose of establishing guidelines for ethical research and researcher self-care.

**Impressions of the Emotion Coding Framework**

Researchers did not necessarily process strong emotions as part of the research process, though most at least talked them over with someone or journaled about them. In retrospect, however, they acknowledged that their emotions still played a role in their findings and future research, even when not documented as such. When applying the framework, they were more aware of the role emotions were playing in their analysis and decision-making processes. They reported deeper awareness of their emotions, as well as what these emotions could “signal” about their positionality, research participants, and phenomenon under study.

There was unanimous support for using the emotion coding technique to train graduate students in qualitative research, with recommendations for clearer instructions and even a “checklist” to aid in identifying emotions. Researchers acknowledged that the human experience of emotions—specific emotions and emotional life in general—varies across individuals, languages, cultures, and nationalities. Existing research confirms that emotional experience can also be mediated by the norms around gender, profession, age, and a host of other identities (Tsai, 2024).

Our participants represented a diverse sample in terms of race, age, nationality, career stage, language, and class. The emotions of those with privilege named as “strongest” were related to their privilege and perceptions of participants’ injustices. The framework’s spotlight on emotion helped them identify both their emotional reactions to the injustices their participants faced and the emotions they felt as privileged individuals hearing about these injustices. Johnson-Laird and Oatley (2011) define secondary emotions as feelings we have in response to other feelings, often with some self-judgment attached. These secondary emotions—such as guilt or disappointment—were present for researchers who believed they needed to set aside their “privileged shock” to connect effectively with their participants.
Conclusions and Implications

The researchers who participated in our study reported that emotions informed each stage of their process, from design through implementation and report-writing. Emotions can serve as a signal to pause and reflect on the data. Doing so can elucidate information about the researcher (positionality), participants, or project overall. A systematic technique like emotion coding can help make this process more explicit.

Based on feedback from our participants, the emotion coding model can and should be more detailed, with a list of potential emotions to support emotional literacy. Specifically, one participant recommended an interactive online program where participants could watch the process of emotion coding and then try it for themselves, perhaps sharing their results with trusted peers. Another suggested the model might be especially applicable for applied research courses, where students are actively digesting data in their current places of work. Lastly, one participant noted that in some cultures, particularly East Asian ones, hiding emotions is highly valued, and this would further inhibit researchers from being able to identify their emotions. This speaks to a higher level of surface acting in some cultures than others, and while the model can be more explicit, it cannot change ingrained attitudes towards emotions in the first place. It is important for qualitative methods educators to create spaces where students can feel safe and in good company as they notice what emotions data surface, and what these emotions can teach.

Implications for Research

Jeannie engaged in surface acting when she sensed her emotions would overshadow her participants and would betray Jeannie as naive. This is arguably an example of a white researcher remaining conscious of her White fragility (DiAngelo, 2018). Yet we can also see how setting emotions aside may serve to separate the researcher from the participant, interfering with the deep, empathic “heart-work” of working across difference (Farinde et al., 2017). We classify this as a form of surface acting, as it involves performing a different or more muted version of one’s true emotions to meet the demands of one’s profession. Rather than set aside or downplay her shock, what if Jeannie was open about it with her participant? Would this have created a space for more human connection? Or, as she presumed, would it have inadvertently drawn too much attention to her feelings and away from the feelings of her participant? These questions are worth further discussion and investigation.

Implications for Qualitative Researcher Training: Academy and Industry

Our research extends existing research about techniques for eliciting data from participants. Emotion coding can help researchers harness our own emotions as data. However, this technique will only be as effective as it is accessible to all researchers. Researchers from cultural backgrounds that do not value strong emotional expression may benefit from questions that prompt them to identify their emotions, as well as specific instructions for connecting these emotions to data. Models of how researchers have used emotion coding may be useful for training. Additionally, when using the technique for the first time, researchers may benefit from a dialogue rather than an independent written exercise. Additional improvements to the technique include clearer instructions; clarification that this is a form of auxiliary, not descriptive, coding; and clarification that emotion codes are not meant for all data.

Researchers who worked in industry, particularly program evaluation, expressed apprehension with engaging in emotion coding, believing their jobs did not allow them the time or emotional bandwidth to engage in emotion coding. These fields might benefit from time to
document (journal or memo) emotions and incorporate them as the researchers see fit. This does not need to create a great deal of extra time or labor but may help prevent burnout for researchers like Nina who are conducting emotionally intensive work under tight deadlines. While deep acting was not prevalent in our findings, it was severe: we heard reports of researchers feeling triggered, or even engaging in self-harming behaviors, when they were not able to process emotions effectively. Whether these behaviors were sequelae from secondary trauma, or triggered primary trauma, they are not sustainable, and it is important that the academic community not ignore or codify them as an unavoidable part of the job. Most strong emotions that arose in our study were negative ones, because negative emotions arise from pressing human subject research. Researchers and their fields will benefit if we can address and prevent trauma through an accessible technique that fits alongside other analysis. Emotion coding could be one such technique.

References


Appendix

Instructions for Participants

Instructions:

Step 1: Please read the manuscript titled "Our Data, Ourselves: A Framework for Using Emotions in Qualitative Analysis"

Step 2: Select a chunk of qualitative data from a current or previous qualitative or mixed methods study you have conducted. This chunk of data can be of any length but should probably be at least a paragraph. Examples of data could include: A transcription from an interview or focus group; a set of fieldnotes from an observation; a document or speech you intend to analyze; or a video or image you are using as visual data. Also, it is helpful to choose a chunk of data that you feel motivated to revisit and sense may give rise to strong feelings or thoughts.

Step 3: Using the framework laid out in the manuscript, read through the data in Microsoft Word or printed form. At any point that you experience a strong personal thought or emotion, annotate this in the margin by adding a "comment."

Step 4: In a separate Word document that you will submit, create a table like the one below. Read back through your annotations and make a list of them on a separate piece of paper or document. Put each thought or feeling in the column to the left. In the column to the right, answer the three questions laid out in the framework:

1. What does this tell me about myself as a researcher?
2. What does this tell me about this piece of data or participant?
3. What does this tell me about the phenomenon I am studying?

<table>
<thead>
<tr>
<th>1. Strong Thought or Feeling</th>
<th>2. Emotion Coding Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>4.</td>
</tr>
</tbody>
</table>

Step 5: When you have completed this exercise, please free-write at least one page (by hand or digitally) about your overall impressions of the interview. Imagine writing for an academic article, and feel free to incorporate scholarly citations or other data as necessary.

Step 6: Reflect on the following four questions, either in writing or as you prepare for your interview:
5. What insights did this process give you into your data and yourself as a researcher that you may not otherwise have had?
6. What feedback do you have for this framework/process to make it more accessible and inclusive?
7. Do you have any thoughts about using this framework to train graduate students and future researchers?
8. Do you have any other thoughts or feedback to share?

Step 7: Please submit your Word document(s) from Steps 4, 5, and 6 to hilary_lustick@uml.edu with the subject line “Emotion Coding Data.” If you include the names of any research participants, please make sure you identify these and otherwise adhere to any IRB restrictions on your data.

Thank you for participating in this study, and we look forward to hearing from you!
Sincerely,
The Research Team
Author Note

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