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Qualitative Research by a Non-Hierarchical Team

José G. Rigau-Pérez

University of Puerto Rico, jos.rigau@gmail.com

Silvia E. Rabionet

Nova Southeastern University, rabionet@nova.edu

Annette B. Ramírez de Arellano

University of Puerto Rico, annette@ramirezdearellano.com

Wilfredo A. Géigel

University of the Virgin Islands, wageigel@gmail.com

Raúl Mayo-Santana

University of Puerto Rico, raul.mayo@upr.edu

See next page for additional authors

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Abstract

In this and subsequent issues, The Qualitative Report will publish eight articles about a journal written by Edward B. Emerson (1805-1834), a younger brother of American philosopher and writer Ralph Waldo Emerson. This introduction will describe the origins of the project, the sources, the process and the outcomes of the collaboration. The authors hope to document and illustrate the richness and value of interdisciplinary qualitative inquiry, while providing specifics of how the Emerson Journal Project evolved. We provide examples to illustrate the characteristics of effective teamwork, but also present the challenges along the way and how they were surmounted. The breadth of the topics in the journal and the range of expertise within the team have resulted in the use of different approaches to examine Emerson's text. It is the authors' goal that these essays will enhance the reading of Emerson's journal, while contributing to the social and historical understanding of the Caribbean.

Keywords

Teamwork, Qualitative Research, Textual Analysis, Documentary Editing, Personal Journals, Edward Bliss Emerson

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Authors

José G. Rigau-Pérez, Silvia E. Rabionet, Annette B. Ramírez de Arellano, Wilfredo A. Géigel, Raúl Mayo-Santana, and Alma Simounet



The Edward Bliss Emerson Journal Project: Qualitative Research by a Non-Hierarchical Team¹

José G. Rigau-Pérez

University of Puerto Rico, San Juan, Puerto Rico USA

Silvia E. Rabionet

Nova Southeastern University, Fort Lauderdale, Florida USA

Annette B. Ramírez de Arellano

University of Puerto Rico, San Juan, Puerto Rico USA

Wilfredo A. Géigel

University of the Virgin Islands St. Croix Campus, St. Croix, US Virgin Islands USA

Raúl Mayo-Santana and Alma Simounet

University of Puerto Rico, San Juan, Puerto Rico USA

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Introduction

In this and subsequent issues, *The Qualitative Report* will publish eight articles about a journal written by Edward B. Emerson (1805-1834), a younger brother of American philosopher and writer Ralph Waldo Emerson. Edward's 'imperfect health' took him first to Alexandria (Virginia), then the Mediterranean and Europe, where he lived for one year, and, later, following an episode of insanity and a diagnosis of pulmonary consumption, to the West Indies. After a short stay in St. Croix, he moved to "Porto Rico," where he lived for more than three years, with a brief interlude in New England to bid his birthplace his "last farewell." While in St. Croix and Puerto Rico, Emerson kept a journal (1831-1832); he also wrote letters to family and friends until he passed away in October 1834.

¹ Edward B. Emerson's Caribbean journal and letters can be accessed online at <http://bibliotecadigital.uprrp.edu/cdm/ref/collection/librosraros/id/1701>. Unless otherwise specified, his letters from that period can be found in that text. Permissions to quote from Edward Emerson's journal and letters have been granted by the Ralph Waldo Emerson Memorial Association and Houghton Library, Harvard University, and the Massachusetts Historical Society, and are gratefully acknowledged.

His journal and letters include descriptions and personal reflections on life in the Danish (now United States) Virgin Islands and Puerto Rico, their peoples, and customs. The diversity of topics, events, and tones caught the attention of a group of scholars with different backgrounds. Each approached the texts from a particular perspective; the result is this series of articles offering a multidisciplinary and contextual interpretation of Edward's writings.

Travel diaries, journals, and letters provide a window into the inner selves of the writers, while exposing their interpretation and appreciation of the settings, sites, participants and events that surround them. These writings are a valuable source of information for the qualitative researcher interested in understanding how people derive meaning and share past and present experiences as they encounter new places. The unusual circumstances that led six 21st century Antillean scholars in different disciplines to focus on the 19th century writings of a New England intellectual deserve greater explanation. This introduction will therefore describe the origins of the project, the sources, the process and the outcomes of the collaboration. The authors hope to document and illustrate the richness and value of interdisciplinary qualitative inquiry, while providing specifics of how the Emerson Journal Project evolved.

Finding Edward B. Emerson's Journal and Letters

One of the authors, José G. Rigau-Pérez, had read short, published excerpts of Edward Emerson's journal and sought the complete manuscript in the Ralph Waldo Emerson Memorial Association deposit at Houghton Library, Harvard University. He inadvertently took down two different call numbers for the text, one from the digital listing and a second from an earlier printed catalog. It turned out that there were two diaries: the manuscript original and a typed transcription dated 1924-1925.

The original journal was written on a small memorandum book typically used to jot down reminders and descriptions. Edward later incorporated these descriptions in the correspondence sent to relatives. In addition to the journal, Rigau came across the recent book by Bosco and Myerson (2006), which includes an extensive collection of letters of the Emerson family that encompassed the dates of the journal. The journal had never been published in full, and only some letters had been included in older biographical works on the Emersons (see, for example, Cabot, 1895; Firkins, 1915; Holmes, 1885). Rigau knew that he had come across an interesting and unique find. He obtained a photocopy of the typescript, made contacts in St. Croix and St. Thomas (where he gave a lecture on Emerson's journal) and waited for the right time to decide how best to approach and share the journal with a broader audience.

A Team Is Born

Shortly thereafter, at the end of 2010, Rigau received a card from Silvia E. Rabionet, with her New Year's wish for reconvening a research group. Their prior effort had involved four colleagues (Raúl Mayo-Santana, Annette B. Ramírez de Arellano, Rigau, and Rabionet) who worked together from 2004 to 2008 on an edition of Dr. Francis W. O'Connor's unpublished travel diary of 1927. That collaboration resulted in a book, *A Sojourn in Tropical Medicine* (Mayo-Santana, Ramírez de Arellano, & Rigau-Pérez, 2008).

Rigau presented Emerson's journal to the group in two stages. First, in a "concept review" (as used at the National Institutes of Health) he gave a summary of the contents of the text and showed his only copy around the table. The group (three in person, one by telephone) discussed approaches and gave a preliminary indication of interest. A second meeting was scheduled for two months later, to discuss the possibility of studying and

commenting on the text from different angles or focusing on different topics, as they had done with the diary of Francis W. O'Connor. Rigau had his photocopy transcribed to digital format and shared it with the group, so a formal decision could be taken after all had read the text. All envisioned various ways to connect with the journal, while contributing to the social history of 19th century Puerto Rico and St. Croix. The group also recognized the need to include someone who was familiar with the history of St. Croix. Rigau had already consulted Wilfredo Géigel, who practices law and writes history in the US Virgin Islands, and who (surprisingly) already had a copy of Emerson's diary. The group had discussed that Emerson's learned writing and language deserved particular study. Géigel's wife, Alma Simounet, a professor of English at the University of the Virgin Islands and University of Puerto Rico, volunteered to join the project and undertake a linguistic analysis of the text.

With six persons committed to the project, the multidisciplinary group was formed. By education and experience, and because each individual has been trained in more than one discipline, the six-member team includes a psychologist, a planner, a physician, a lawyer, a linguist, a philosopher, two educators, three data analysts, three public health practitioners, and four historians. Despite this professional diversity, all are familiar with methods of analyzing a text and using it to expand and contextualize the topic under study. The diversity and complementarity of the group proved effective because it allowed each member to first explore the journal, after which each one proposed developing the theme(-s) that seemed most interesting personally and most amenable to analysis. The group then discussed the proposed themes. Some were rejected because they did not figure prominently in the text, while others would have required an unwieldy expansion of the group of researchers. At the end, the group agreed to include a transnational contextualization of the diary, a biographical essay on Emerson, an examination of pulmonary consumption, a review of medical tourism, and explorations of the discursive and philosophical underpinnings of Emerson's views about the persons, places and situations he encountered, including slavery. In this way, and with reinforcement throughout subsequent meetings, the team developed a clear understanding of, and commitment to shared goals (Barry, Britten, Barber, Bradley, & Stevenson, 1999).

Once the group embarked on its task, it found that at least four previous scholars had tried to publish the journal (see the Editor's Note in the journal and letters). The first was Sylvester Baxter, of Boston and San Juan, who in 1924-1925 was responsible for having the original located and transcribed in a typed version. His notes and the manuscript of his unpublished book on the Emerson brothers are available at Houghton Library in Harvard University. Approximately 50 years later, Dr. Donald Thompson, a historian of music at the University of Puerto Rico, also studied Emerson's text and obtained a copy of the typescript, which he eventually gave to Mr. Géigel. Frank Otto Gatell, in 1959, and Félix Matos, in 1991, published short excerpts of the diary related only to Puerto Rico. The work of predecessors both facilitated and complicated the project. They are, unwittingly, part of the team. Baxter's work, in particular, is a valuable source because he looked into many of the same questions the current team has had concerning persons and events mentioned by Emerson. At the same time, information that he considered reliable can now be disproven; moreover, the typed transcription is not entirely accurate, so the current team has had to correct, annotate, and refine the treasure left by Baxter.

The Working Team and Its Methods

The coordination of multiple collaborators is time-consuming, so team work is undertaken when the completion of a task requires more effort, time, or expertise than one person can provide. A literature review to identify the characteristics of effective teamwork (Mickan & Rodger, 2000) presented three domains that covered 18 traits: Organizational structure (clear purpose, appropriate culture, specified task, distinct roles, suitable leadership, relevant members, adequate resources), Individual contribution (self knowledge, trust, commitment, flexibility), and Team processes (coordination, communication, cohesion, decision making, conflict management, social relationships, performance feedback). Recent reviews of the use of multidisciplinary teamwork in qualitative research have suggested the value of explicit discussions of reflexivity, that is, a discussion of the "awareness of the researcher's own presence in the research process" (Barry et al., 1999, p. 30; see also Hall, Long, Bermbach, Jordan, & Patterson, 2005).

Our group approached teamwork from instinct and personal experience, not from a predetermined theoretical framework for operation. We nevertheless covered the three domains cited above, almost in chronological order. In spite of the experience of group members who had worked with each other, great care (and time) was devoted to a definition of the group's objective, and clarification of the idea of a final product and each member's contributions.

After the team was formed and the themes were selected, each member began the research process, locating additional resources, selecting a methodology or systematic approach to the text, and finally writing and editing the essays. This individual effort was also accompanied by the sharing of sources of information and the collective integration of perspectives (Hall et al., 2005). The project was generally coordinated by José Rigau. He kept a calendar of milestones, provided and monitored timelines, facilitated communication, made available the original texts, and was the liaison with archives and other repositories of primary sources. Leadership was nevertheless participative; different group members guided the activities or proposals that were related to their particular expertise or institutional affiliation. All colleagues have achieved significant seniority in their institutions, so their proposals were taken seriously.

Although each author was responsible for his or her presentations and papers, drafts of articles were subjected to the scrutiny of the entire group. In practice, each essay underwent editorial revision by the coordinator and at least two other team members. The method had been stipulated at the beginning of the team's discussions about the project. An often-intense process that could have caused resentment was offset by the desire to learn from one another. In addition, this awareness of what all authors had written helped prevent the repetitions and information gaps frequently present in multi-authored books. During the process it became evident that the group had the makings of a successful team: mutual trust and accountability, a commitment to excellence, a sense of humor, generosity and a willingness to share findings, and the recognition of the personal and professional constraints that each one faced (Hall et al., 2005).

The authors must give credit to the subject of their work. They can not discount the influence of the Emerson family's example. Many eloquent texts throughout Edward's life evidenced the relatives' demonstrations of mutual support, frequent communication in spite of distance, and awareness of the other's foibles with an unwavering concern to help, not to criticize.

Because team members live in four different cities (from north to south: Washington, DC; Fort Lauderdale, Florida; San Juan, Puerto Rico; and Christiansted, St. Croix), communication was primarily through e-mail, interspersed by periodic meetings. The group

also visited some of Emerson's old haunts in the Boston area, and had the opportunity to visit archives at Harvard and the Massachusetts Historical Society (Boston). The team consolidated its efforts and received feedback from each other and from experts by presenting its work at different professional meetings in different venues, reaching a variety of audiences over the course of two years. The group shared its "work in progress" during the Annual Eastern Caribbean Island Cultures Conference in Grenada, in 2011 and in *The Qualitative Report* (TQR) 3rd Annual Conference held in Fort Lauderdale, in 2012. In 2013, the essays were also presented at the annual meetings of the American Historical Association in New Orleans, the Association of Virgin Islands Historians in St. Croix, the IV Puerto Rican Public Health Conference and the 13th Caribbean Conferences Series (University of Puerto Rico) in San Juan, and the Eastern Caribbean Island Cultures Conference in Aruba.

The variety of venues was made possible by the members' diversity of institutional affiliations. It provided an opportunity for the group to convene, revise the papers, and reflect on each member's changing view of the subject of analysis. In the process, and quite unexpectedly, the team approach, which the group took for granted, provoked questions and wonder from the different audiences. Presentations served to further develop professional and personal relationships among team members, and as a mechanism for assuring the completion of intermediate stages by non-negotiable deadlines, as they were externally prescribed.

In the absence of outside funding, each member of the team has contributed to the collective efforts in different ways: by making documents and other sources available to the group, providing housing to colleagues, facilitating the use of offices, and providing other in-kind contributions as needed. And because each team member has personal and professional networks, the group as a whole has had much wider exposure to sources of information and expertise, and opportunities to present to professional audiences, than would have been available to any researcher working alone.

The resources of independent scholars have multiplied thanks to the availability, through the Internet, of references, and primary and secondary sources. Research on the persons and daily routines of small islands two hundred years ago, and the texts of a writer who mixed his observations with languages and literary output from much of Europe took years, but would have taken decades if the authors had not been able to utilize search engines and digital databases. They have been fortunate, also, in the reception the project found in the editors of *The Qualitative Report*, in the digital media, and the encouragement and assistance given by the journal and its parent institution, Nova Southeastern University (Fort Lauderdale, Florida).

Challenges Along the Way

Three common challenges of multi-author collaborations include difficulties with communications, lack of compliance with deadlines, and resistance to editorial suggestions. The Emerson Project was able to surmount these through anticipatory guidance, flexibility, and peer action.

At the outset, the group understood that some of its members had more time to devote to the project than others. It was agreed that on-going professional responsibilities had to take precedence over the new project. In addition, the lack of frequent personal interaction meant that e-mail communications regarding the project could remain unread, or quickly forgotten among other demands. Anticipating this problem, group meetings focused on the proposed commitments, and made those decisions very explicit. The meetings' minutes highlighted "action items" and were quickly circulated to all members for approval. Electronic communications allowed for easy and, if necessary, frequent repetition of messages when

responses were unclear or not forthcoming. On rare occasions, the team had to rely on trust, so that in spite of a gap in communications, work was continued with the expectation of a positive result.

Inevitably, some researchers were unable to comply with deadlines due to unforeseen personal or professional constraints. Most group members adhered to the timetable, which in turn created a backlog for the project coordinator and later the journal reviewer. This lag meant that, by the time the initial texts were ready for copyediting, the delayed manuscripts had been submitted.

Perhaps the thorniest problem in collaborative writing occurs when an author's research reveals a more complex subject than initially conceived, or when, during the writing process, the subject dictates a broader treatment than originally planned. This results in delays, patches of obscure writing, unfocused arguments, and authors' exhaustion. Editorial comments to the authors can then provoke dismay. Confrontation can risk a 'take it or leave it' response from an author. The Emerson team avoided this stage through the use of multiple reviewers and consultation with outside readers. By stressing the need for consensus and quality control, discrepancies were avoided and differences were resolved.

A Multiplicity of Qualitative Methods

Both the breadth of the topics in the journal and the range of expertise within the team have resulted in the use of different approaches to examine Emerson's text. The methods used therefore vary as a function of the subject matter and the individual author's background and interests, as described below.

Rigau, an epidemiologist experienced with databases and a historian well-versed in the interpretation of eighteenth and nineteenth-century manuscripts, transcribed and annotated Edward's text, following closely the recommendations of the Society for Documentary Editing (Kline & Perdue, 2008). His essay on Emerson's transnational journal is at the same time an introduction to the content of the manuscript texts, a guide to the thematic analytical essays, and a brief comparative presentation of the three societies that elicited Emerson's reflections: New England, St. Croix, and Puerto Rico. Rigau's choice of indicators of similarity or difference was guided by their importance in Edward's own texts.

Rabionet, an educator in the field of public health and health promotion, wrote the biographical essay. Because the journal was limited to events at the end of Edward's life, she pursued other avenues to collect information about him. She consulted a wide range of sources, including letters to him, from him, and about him, beginning with those written when he was an 11-year old student in boarding school. She also located Emerson's notes on previous travels, including trips to Europe; his scholarly work and writings while at Harvard, including his orations, class notes and thesis; unpublished manuscripts about the family; official documents, such as the registry of his birth in the City of Concord and the licenses to practice law in Massachusetts and New York; and books and articles about the Emerson family. The examination of these documents, using content and narrative analysis, allowed her to further capture the circumstances and intensity of a life cut short.

Ramírez de Arellano, whose prior work has focused on the intersection between policy and health practices, examined Emerson's comments on his physical condition and his chosen therapies. Because consumption was considered a constitutional disease that involved the entire body, treatment regimes were comprehensive, involving environmental factors such as climate and occupation as well as lifestyle choices related to nutrition, exercise, and smoking. Edward was diligent keeping a record of everything he did to further his health, providing the researcher with a narrative medical record. Additionally, because he had access to prominent doctors in Boston and New York, it is possible to link his own therapies with

the prevailing medical orthodoxy at the time. A similar method was followed with respect to the topic of slavery, contrasting Edward's thoughts and reticence with those of other contemporaneous eyewitnesses addressing the same topic.

Géigel, an attorney and historian living in St. Croix, placed Emerson's voyages within the burgeoning tourism industry of the era, and in the context of the long history of travel in search of health, from Greek and Roman times to the present. He examined the island's reputation as a haven for invalids in the 19th century, and Edward's personal experience, through the contemporary publications of travelers (some of them invalids who spoke of their experiences) and the government documents of the period.

Simounet, a linguist, performed a close reading of Emerson's words to examine his often unstated opinions about the populations with which he interacted. She used the theoretical and methodological approach of critical discourse analysis to explore the relationship between language, power, and privilege. She specifically focused on Emerson's construction of reality through his use of language.

Mayo-Santana's essay explores the philosophical underpinnings of Emerson's journal and of the letters he wrote to his family at the time. The essay revolves around three main themes: nature writing, American Exceptionalism, and philosophical reflections. The methodological strategy followed was based primarily on qualitative content analysis. The first step in this required the development of a conceptual scheme to illuminate and guide the thoughts and ideas present in the text. A second step involved the elaboration of a series of questions (e.g., how does Edward endure the constraints of a terminal sickness that has already curtailed a promising intellectual career?) and the selection of key themes based on relevant Transcendentalist and naturalist texts. This established the contours of topics of interest and refined their analysis. The conclusion of textual analysis centered on a final question: Does the philosophical idea of the tragic hero apply to Edward's life and demise?

The Collective Creation

The team of researchers is committed to making this wealth of information and key eyewitness accounts available to scholars from the Caribbean and the United States. The project therefore has sought to accomplish two fundamental tasks. First, the digital version of an annotated transcription of Edward Bliss Emerson's Caribbean Journal and Letters has been made available in an open access digital document. Second, the corresponding analytical essays will be published in this and the subsequent issues of *TQR* (articles by Géigel, Mayo-Santana, Rabionet, Ramírez de Arellano, Rigau-Pérez, and Simounet, 2014, in the list of references). It is the authors' ultimate goal that these essays will enhance the reading of Emerson's journal, while contributing to the social and historical understanding of the Caribbean. Above all, it is their aim that these materials will elicit further exploration of Edward Emerson's texts and of the many themes they present.

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Authors Note

José G. Rigau-Pérez is a graduate of the University of Puerto Rico, Harvard Medical School, and the Johns Hopkins School of Hygiene and Public Health. As a medical epidemiologist, he conducted research in disease control and outbreak investigations for more than 25 years. He has published widely on the history of health in Puerto Rico and is a member of the American Epidemiological Society and the Puerto Rican Academy of History.

Silvia E. Rabionet is an associate professor in health education at the University of Puerto Rico School of Public Health and Nova Southeastern University College of Pharmacy. She received a BA from Mount Holyoke College, and MA and EdD from Harvard University. She directs the *Puerto Rico Mentoring Institute for HIV and Mental Health Research* which supports junior researchers. She has published about public health education, mentoring, research capacity building, and sociobehavioral aspects of drug use.

Annette B. Ramirez de Arellano is a graduate of Mount Holyoke College (political science), Yale University (city planning), the University of Puerto Rico (health planning),

and Columbia University (doctorate in public health). Her work focuses on health policy and the practice of public health.

Wilfredo A. Géigel is a trial lawyer by profession, an independent scholar, member and past president of the Society of Virgin Islands Historians, and Adjunct Professor of History at the University of the Virgin Islands, St. Croix Campus.

Raúl Mayo-Santana is Ad-Honorem Professor at the School of Medicine, University of Puerto Rico; he has MS and PhD degrees in Psychology and MA in Philosophy. He was principal editor of *A Sojourn in Tropical Medicine* (2008), and has co-authored several books on the history of slavery in 19th century Puerto Rico.

Alma Simounet is a Professor of English and Linguistics at the University of Puerto Rico. She is an active member of the Ph.D. Program in the Literature, Language, and Culture of the Anglophone Caribbean.

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Correspondence concerning this article should be addressed to: José G. Rigau-Pérez; E-mail: jos.rigau@gmail.com

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