Research

File7Qualitative Data Collection Methods-2

وعلى الله فليتوكل المتوكلون

Conducting Observations in Research

Introduction to Observational Research

Observation involves a range of activities and considerations for researchers, such as ethics, rapport building, selecting key informants, conducting the observation process, keeping field notes, and writing up findings

- ✓ الملاحظة في البحث النوعي لا تقتصر على "رؤية ما يحدث"، بل تشمل العديد من الجوانب المهمة مثل: الاعتبارات الأخلاقي، بناء علاقات وثقة مع المشاركين، اختيار الأفراد الرئيسيين للملاحظة،كيفية تنفيذ عملية الملاحظة، كتابة ملاحظات ميدانية، صياغة النتائج النهائية للبحث،كل هذه الجوانب يجب أن يأخذها الباحث بعين الاعتبار عند استخدام أسلوب الملاحظة.

Ethics in Observational Research

•Field Notes & Transparency: Researchers should reinforce their research purpose by taking field notes and informing community members about the study when first meeting them. الشفافية والملاحظات الميدانية:يجب على الباحث أن يوضح هدف البحث من البداية، ويكتب ملاحظاته الميدانية بدقة وشفافية، ومن المهم إعلام المشاركين أو أفراد المجتمع بأن الباحث موجود لأغراض البحث

•Ongoing Introduction: Researchers must continually introduce themselves as researchers to maintain transparency. التعريف المستمر بالنفس: يجب أن يواصل الباحث تعريف نفسه بأنه باحث طوال فترة الملاحظة، ليحافظ على الشفافية مع المشاركين

•Anonymity: It is an ethical responsibility to preserve participants' anonymity in both field notes and final reports. الخصوصية والسرية: من مسؤولية الباحث الأخلاقية الحفاظ على سرية هوية المشاركين، سواء في الملاحظات أو في تقارير البحث النهائية

Maintaining Ethics in Naturalistic Observation

Ethical considerations are crucial, especially in naturalistic (real-world) settings, to protect participants' rights and well-being. من المهم أن يكون الباحث واعيًا لحقوق المشاركين وسلامتهم، خاصة عندما يتم جمع البيانات في بيئتهم الطبيعية (كالمدارس أو المستشفيات).

- Avoid covert observation if another research method can address the research question. على الباحث أن لا يلجأ إلى مراقبة الناس دون علمهم (أي الملاحظة السرية)، إلا إذا لم تكن هناك وسيلة أخرى مناسبة للإجابة على سؤال البحث
- Obtain permission from non-target individuals in the research setting (e.g., school administrators, parents, community leaders), and inform others who might be affected.
- الحصول على إذن من الأشخاص غير المستهدفين وإبلاغ المتأثرين كأصحاب مكان الدراسة
- Debrief participants after observation, explaining the purpose, reasons for not informing them earlier, the value of their input, and addressing their concerns. تغذية راجعه لهم

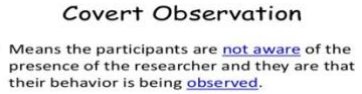
- Ensure confidentiality of observed individuals by keeping identities anonymous and handling all data securely and responsibly. سريه تامة

Overt vs. Covert Observation الملاحظة العلنية والسريّة

•**Overt Observation:** Participants are aware they are being observed and know the study's purpose (Couchman & Dawson).المشاركون يعرفون أن هناك باحثًا يراقبهم ويدركون هدف الدراسة

•**Covert Observation:** Participants are unaware of being observed, or the observer conceals the real purpose (Hammersley & Atkinson). المشاركون لا يعلمون أنهم تحت الملاحظة، أو يتم إخفاء الغرض الحقيقي للملاحظة عنهم

✓ Ethical Issues: Covert observation is now generally considered unethical due to deception and violation of autonomy. الملاحظة السرية تُعتبر غير أخلاقية حاليًا لأنها تعتمد على الخداع وتنتهك مبدأ حرية الفرد ومعرفته بأنه موضوع للدراسة



Research method	Advantage	Disadvantage
Participant observation	Observer can be a part of the process so can really see & experience what is going on	Can be dangerous for observer
Non-participant observation	Observer remains safe	Observer cannot get a feel for what is happening
Overt observation	Ethical	"observer effect" means respondents may act differently
Covert observation	Respondents act as they normally would	Unethical

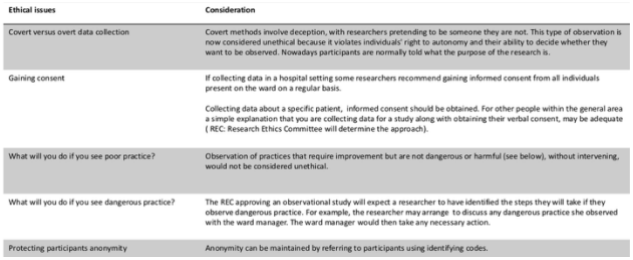
Ethical Issues in Observational Studies (Twycross & Shorten)

•Covert **vs.** Overt Data Collection: Covert methods involve deception and are now usually avoided. جمع البيانات السري مقابل العلني: استخدام الخداع(مراوغة) لم يعد مقبولًا أخلاقيًا إلا في حالات نادرة جدًا وبشروط

•Gaining Consent: In settings like hospitals, informed consent should be obtained from all relevant individuals. The approach may vary based on the Research Ethics Committee (REC) guidance. الحصول على الموافقة: يجب أخذ موافقة مسبقة من المشاركين (مثلاً: المرضى في المستشفيات)، طريقة الحصول على الموافقة تختلف بحسب تعليمات لجنة الأخلاقيات

•Responding to Poor or Dangerous Practice: Researchers must have a plan for addressing observed poor or dangerous practices, such as reporting dangerous behavior to a supervisor. التعامل مع ممارسات خطيرة أو سيئة: إذا لاحظ الباحث سلوكًا خطيرًا أو غير مهني (مثلاً: إهمال طبي)، عليه أن يكون لديه خطة للتعامل مع الموقف، مثل إبلاغ المشرف

•Protecting Anonymity: Use identifying codes to maintain participant anonymity. يجب استخدام رموز أو أسماء مستعارة بدلاً من الأسماء الحقيقية لحماية خصوصية المشاركين.



Ethical issues	Consideration
Covert versus overt data collection	Covert methods involve deception, with researchers pretending to be someone they are not. This type of observation is now considered unethical because it violates individuals' right to autonomy and their ability to decide whether they want to be observed. Nowadays participants are normally told what the purpose of the research is.
Gaining consent	If collecting data in a hospital setting some researchers recommend gaining informed consent from all individuals present on the ward on a regular basis. Collecting data about a specific patient, informed consent should be obtained. For other people within the general area a simple explanation that you are collecting data for a study along with obtaining their verbal consent, may be adequate (REC: Research Ethics Committee will determine the approach).
What will you do if you see poor practice?	Observation of practices that require improvement but are not dangerous or harmful (see below), without intervening, would not be considered unethical.
What will you do if you see dangerous practice?	The REC approving an observational study will expect a researcher to have identified the steps they will take if they observe dangerous practice. For example, the researcher may arrange to discuss any dangerous practice she observed with the ward manager. The ward manager would then take any necessary action.
Protecting participants anonymity	Anonymity can be maintained by referring to participants using identifying codes.

Gaining Entry and Establishing Rapport بناء الثقة

•Minimizing Observer Effect: Establish rapport before data collection to reduce the impact of the researcher's presence. يجب على الباحث بناء علاقة ثقة مع المشاركين قبل البدء في جمع البيانات، لتقليل تأثير وجوده على تصرفاتهم

- ✓ A key strategy in minimising the ettect of the researcher's presence on behaviour is to establish rapport betore starting data collection (Twycross & Shorten).

•Permission and Introduction: Bring letters of introduction, explain affiliations, funding, and duration, and meet community leaders or relevant authorities (e.g., school principals). خطابات تعريفية وتوضيح الانتماء الأكاديمي، مصادر التمويل، مدة البحث، ومن المهم التواصل مع الجهات الرسمية أو قادة المجتمع (مثل مدراء المدارس)

• "Hanging Out": التواجد غير الرسمي Building trust through informal interaction over time, progressing through *three stages:*

1. Moving from a position of formal: Learning social rules and language. الباحث جديد ويبدأ بفهم القواعد الاجتماعية واللغة المستخدمة

2. Ignorant intruder to welcome (**Acquaintance**): Becoming less of an outsider and more familiar.يصبح أقل غربة ويبدأ في الاندماج, • The language becomes more familiar to the researcher, but he/she still may not be fluent in its use.

3.Knowledgeable Intimate (**intimate** stage): Fully integrated and able to participate naturally in daily activities.يصبح جزءًا من المجتمع الذي يدرسه، ويشاركهم حياتهم اليومية بشكل طبيعي

• The researcher has established relationships with participants to the extent that he/she no longer has to think about what he/she says.

Tips for Collecting Useful Observation Data

•Preparation: Familiarize yourself with the setting before starting. من الأفضل أن يتعرف الباحث على البيئة التي سيجري فيها الملاحظة قبل البدء الفعلي

•Start Small: Keep initial observations short to avoid being overwhelmed. البدء التدريجي يُنصح بأن تكون جلسات الملاحظة الأولى قصيرة حتى لا يشعر الباحث بالإرهاق

•Honesty: Be open but not overly technical when explaining your presence. يجب أن يكون الباحث صادقًا في تفسير سبب وجوده، لكن دون الدخول في تفاصيل تقنية معقدة قد تُربك المشاركين

•Observation Techniques: Alternate between broad and narrow focus and pay attention to key words for later recall.

Core Observation Questions (Moser & Korstjens,)

Each observation should answer:

- Who is being observed? من الأشخاص الذين تمت ملاحظتهم؟
- What is being observed?ما النشاط أو السلوك المُلاحظ
- Where does it take place?الموقع أو البيئة التي جرت فيها الملاحظة؟
- When does it occur? متى حدثت
- How does it happen?كيف تمت الأحداث؟ ما هي الآليات أو التفاعلات التي لوحظت
- Why does it happen as it does?لماذا جرت الأمور بهذه الطريقة؟ ما العوامل أو الأسباب التي أثرت في الموقف؟

Example Research Design Using Observation

•Research Questions: Focus on team interaction, communication, and interprofessional values in operating theatres. أسئلة البحث:كيف يتفاعل أفراد الفريق الطبي؟ كيف يتواصلون؟ ما هي القيم المشتركة بين التخصصات المختلفة في غرفة العمليات

•Sites: Compare metropolitan and regional hospitals.اماكن الملاحظة

•Participants: Surgeons, nurses, technicians, patients, and key administrative staff.

•Methods: 40 hours of observation, field memos, informal conversations, and semi-structured interviews.

•Data Analysis: Coding notes, thematic analysis, and analytic memos.مذكرات تحليلية

Challenges of Observation

•**Hawthorne Effect:** Participants may change behavior when observed, but often revert to normal after habituation. المشاركون قد يُغيّرون سلوكهم لأنهم يعرفون أنهم تحت الملاحظة لكن مع الوقت، عادةً ما يعود سلوكهم لطبيعته حين يعتادون على وجود الباحث

•Observer Dependence: The process relies on the observer's judgment and attention; critical moments may be missed if distracted. جودة البيانات تعتمد على تركيز الباحث وقدرته على الانتباه، إذا تشتت انتباهه، قد يفوّت لحظات مهمة

•Note-Taking: Balancing observation and note-taking can be challenging. من الصعب أحيانًا تدوين الملاحظات أثناء الملاحظة دون أن يؤثر ذلك على التركيز أو التفاعل مع المشاركين

File8Thematic Analysis التحليل الموضوعي هو أحد الأساليب الأساسية لتحليل البيانات النوعية (مثل المقابلات أو الاستبيانات المفتوحة)، ويُستخدم لاكتشاف أنماط أو موضوعات متكررة داخل البيانات

•Thematic analysis is the process of identifying patterns or themes within qualitative data.

•It aims to find themes that are important or interesting and use them to address research questions, going beyond mere data summarization. اكتشاف "موضوعات" مهمة أو مثيرة للاهتمام في البيانات، وربط هذه الموضوعات بأسئلة البحث، أي استخدام البيانات لفهم الظواهر وليس مجرد تلخيصها.

✓ Thematic analysis is more than simply summarising the data.

• It is used commonly because of the wide variety of research questions and topics that can be addressed with this method of data analysis.

• TA of open ended responses from surveys or transcribed interviews can explore the context of teaching and learning at a level of depth that quantitative analysis lacks while allowing flexibility and interpretation when analysing the data.

•It is described as a flexible, descriptive method suitable for a wide variety of research questions and topics, especially for exploring open-ended survey responses or interview transcripts. طريقة مرنة ووصفية، يمكن تطبيقها على مجموعة واسعة من المواضيع، مناسبة لتحليل: ردود مفتوحة في الاستبيانات،نصوص المقابلات،ملاحظات ميدانية.

Transcribing the Data

Qualitative research often involves transcribing audio or video data verbatim to prepare for analysis, ensuring every utterance is captured for accuracy.

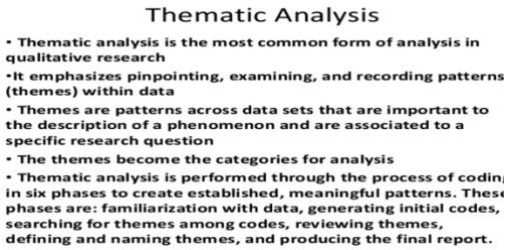
قبل بدء التحليل، غالبًا ما تتضمن البحوث النوعية تفريغ (كتابة) التسجيلات الصوتية أو المرئية كلمة بكلمة (verbatim)،الهدف من ذلك هو الحفاظ على الدقة .

• For thematic analysis, verbatim transcripts are quite common; that is, transcripts that aim to capture every utterance from the participant and serve as an accurate record of the conversation.

What is Thematic Analysis?

•**TA** involves identifying, analyzing, and reporting patterns within data.

•It allows for depth and flexibility in exploring the context of teaching, learning, or other phenomena, but requires transparency to ensure confidence in findings.



Definition of "Theme"

The term "theme" lacks a single definition but generally refers to data grouped around a main issue, a meaningful unit necessary for qualitative findings, or a recurrent occurrence in data analysis. وحدة معنوية مهمة تتكرر داخل البيانات، مجموعة من البيانات تدور حول قضية أو فكرة رئيسية، شيء يُعتبر ضروريًا لفهم الظاهرة التي يتم دراستها.

• the term "theme" is used for describing the fact that the data are grouped around a main issue.
• theme is a structural meaningful unit of data which is necessary for providing qualitative findings.
• a recurrent and systematic occurrence which appears in qualitative data analysis

Analysis vs. Interpretation **Analysis** focuses on what the data says, while **interpretation** التفسير seeks to explain what it means.

Keep in mind……

- ✓ Analysis is saying: What does the data say.
- ✓ Interpretation is saying: What does it mean?

التحليل (Analysis): يعني قراءة ما تقوله البيانات بوضوح وحيادية (مثلاً: العديد من الطلاب يشعرون بالإرهاق)، التفسير (Interpretation): يعني محاولة فهم مغزى أو معنى ذلك (مثلاً: الضغط الأكاديمي قد يكون السبب في هذا الإرهاق).

Six-Phase Framework for Thematic Analysis (Braun & Clarke's)

Step 1:Familiarization التعرف على البيانات (Become familiar with the data)

• The first step in any qualitative analysis is reading, and re-reading the transcripts.
• Researchers must immerse themselves with the data to familiarize themselves with the depth and breadth of the content .
• At this stage, it is useful to make notes and jot down early impressions .
• Once transcribed, interview transcripts should have margins on the left and right sides of the text for coding, particularly when using hand-coding techniques.
• Get a sense of the data holistically, read several times (immersion)
• Classify and categorize repeatedly, allowing for deeper immersion
• Write notes in the margins (memoing)
• Preliminary classification schemes emerge, categorize raw data into groupings (chunking)
• You should remember that all parts of the data are important and if you study some parts selectively, you may ignore other parts.

- •Immersion in the data, making margin notes, and initial classification.
- •Example: Notes on students' perceptions of feedback, highlighting the importance and emotional impact of feedback.

يقوم الباحث بقراءة البيانات عدة مرات بتركيز (مثل مقابلات مكتوبة أو ملاحظات)، يكتب ملاحظات جانبية ويسجل أفكارًا مبدئية، الهدف هو أن يندمج الباحث مع البيانات لفهم محتواها العام، مثال: قراءة إجابات طلاب حول "التغذية الراجعة من المعلمين"، وتسجيل ملاحظات مثل "تشعرهم بالضغط" أو "تحفزهم على التطور"

Step 2:Coding (Generate initial codes)

- •Codes can be about actions, concepts, opinions, or processes, and are chosen based on repetition, surprise, explicit importance, literature, or theory. يتم تحديد أجزاء معينة من البيانات ووضع رموز أو كلمات مفتاحية تصف معناها
- •***Types*** include

• Structural coding (or index coding): Coding based on questions (research questions, interview guide questions) and/or topics of inquiry. تتبع بنية المقابلة أو الأسئلة
• Descriptive coding: تلخص الفكرة العامةCoding of the basic topics of chunks of data (often a noun).
• Process coding:تبين سلسلة خطوات Using gerunds ("-ing" words) to code action in the data -> (Frequently used in grounded theory).

- •*Example*: Codes related to feedback in education (e.g., "help to learn," "improving grade," "reluctance to hear criticism").

•*Example*: Coding an interview about abusive situations, identifying roles and evidence of abuse.

• Codes and coding are sometimes called labels and labelling

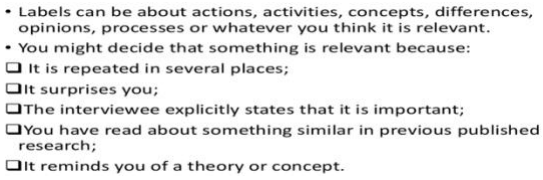
• Codes are labels that assign symbolic meaning to the descrptive intormation compiled during a study

• When applicable, in vivo codes are assigned.In vivo codes are phrases taken from the participants to capture the meaning of the line or text passage .

✓ الرموز "In Vivo" = يعني مأخوذة حرفيًا من كلام المشاركين لتعكس مشاعرهم أو أفكارهم بوضوح

• Coding allows the researcher to simplify and focus on specific characteristics of the data.

• Researchers will move from unstructured data to the development of ideas about what is going on in the data .



Step 3:Searching (generating)for Themes

•Themes are the underlying meanings tying codes together, and the process involves grouping similar codes and naming sets.

• Theme is the subjective meaning and cultural-contextual message of data.

• We examined the codes, some of them clearly fitted together into an initial theme.

• The themes produced at this stage are considered preliminary.

• The themes are sought from the codes whenever the initial codes are formed.

• For this purpose, you should know the codes. You have a long list of different codes. You can gradually bring similar codes under a set. You can give a name to each set and write a concise explanation for that name separately.

يتم تجميع الرموز المتشابهة ضمن مجموعات،تُعطى كل مجموعة اسمًا مبدئيًا يعبر عن المعنى المشترك، الهدف هو الكشف عن أنماط عميقة ومعنى موحّد بين الرموز،مثال: رموز مثل "قلق"، "تردد"، "رفض النقد"، قد تُشكّل موضوعًا اسمه: "الاستجابة العاطفية للتغذية الراجعة"

Step 4:Reviewing Themes مراجعتها

- Themes should make sense, be supported by data, and be distinct from each other.
  - ✓ Subthemes may be identified during this process.

• At this step, we may delete themes, collapse themes together, and identify subthemes.

•Example: The theme "Emotional response to feedback" with a subtheme "Feedback as potentially threatening".

يتم التأكد من أن الموضوعات: مدعومة بالبيانات، متميزة عن بعضها، منطقية وغير متكررة أو متداخلة، وقد يتم اكتشاف موضوعات فرعية (Subthemes) داخل موضوع رئيسي، مثال: الموضوع: "الاستجابة العاطفية للتغذية الراجعة" موضوع فرعي: "اعتبار التغذية الراجعة تهديدًا للنفس"...

- Things to think about include:
- ❑Do the themes make sense?
- ❑Does the data support the themes?
- ❑ Are there themes within themes (subthemes)?
- ❑Are there other themes within the data?

Step 5: Defining Themes

Final Refinement and clear naming of themes, drafting detailed analyses, and possibly peer debriefing for clarity. صياغة تعريف واضح لكل موضوع،يُكتب وصف مفصل لكل موضوع ودوره في فهم الظاهرة.قد يتضمن ذلك عرض الموضوع على زملاء للتأكد من وضوحه peer debriefing

- Identify the essence' of what each theme is about
- During this phase, we wrote detalled analysis tor each Individual theme identitying the story that each theme told while considering how each theme fit into the overall story about the entire data set in relation to the research questions.

- A solo researcher may consult outside experts to determine whether the themes are sufficiently clear and comprehensive .
- In this stage, we may do renaming for the themes
- Theme names need to be punchy and immediately give the reader a sense of what the theme is about .

Step 6: Write-up

Final report includes direct quotes, literature integration, and member checking for validation.

- Usually the end-point of research is some kind of report, often a journal article or dissertation.

إعداد التقرير النهائي ويتضمن:اقتباسات مباشرة من البيانات لدعم كل موضوع،ربط النتائج بالأدبيات السابقة،التحقق من صحة التحليل من خلال عرض النتائج على بعض المشاركين (member checking)

Applications of Thematic Analysis… Examples of studies using TA include research on physicians' empathy levels and their understanding and practices of pharmacovigilance. مستويات التعاطف لدى الأطباء، فهم ممارسات الأطباء في الإبلاغ عن الأدوية الضارة

Example on codes

- An interview with a family member ("I") who had witnessed abusive situations between two relatives; an older man ("he") who provided care for his wife, who suffered from mental and physical disabilities ("she"):

Interview transcript	Initial notes	Codes	Themes
She doesn't get the care she wants. Then she gets worked up, screaming, kicking, making a scene	She gets agitated and makes a scene	Wife's role in the abusive situation	Being caught in a cycle of violence
He goes crazy then	He responds and "goes crazy"	Husband's role in the abusive situation	Being caught in a cycle of violence
After these episodes I think is when I have seen the bruises	After these episodes I have seen bruises	Evidence of abuse	Being caught in a cycle of violence

File9Sampling in Qualitative Research

•Quantitative **vs.** Qualitative Sampling**:** Quantitative research seeks large, statistically powerful samples, often stripping away context. Qualitative research uses smaller samples to explore data in depth and context. البحث الكمي: يختار عينات كبيرة لتمثيل المجتمع إحصائيًا (العدد أهم من العمق)، البحث النوعي: يركز على عينات صغيرة، غير عشوائية، بهدف فهم أعمق للسياق والتجارب

•Sample Size: **Qualitative** research typically uses small, non-probability samples, focusing on depth rather than representativeness.

- ✓ Sample sizes for qualitative research vary by technique but are generally small.

•Iterative Process متطورة باستمرار: Sampling in qualitative research is flexible and evolves as the study progresses. *Data analysis* can influence further sampling decisions until data saturation is reached (no new themes emerge). ليست ثابتة من البداية،تتغير حسب تطور التحليل والبيانات، يتم الاستمرار بجمع البيانات حتى تشبع البيانات أي: لا تظهر أفكار جديدة.

Types of Sampling

- Probability Sampling
- Non Probability Sampling

Approaches to Qualitative Sampling

•Non-conceptually-driven غير قائمة عالمفاهيم: Includes convenience and opportunistic sampling.

•Conceptually driven: Includes purposive and theoretical sampling. العينة القصدية الباحث يختار المشاركين عن قصد لأنهم يمتلكون معرفة أو تجربة مهمة للموضوع.

Convenience Sampling

•Involves selecting participants/settings that are easiest to access.

•Advantages: Less expensive and less time-consuming. اختيار الأشخاص الأسهل في الوصول إليهم، سريعة ورخيصة

Opportunistic Sampling

•The researcher takes advantage of emerging opportunities during the study.

•Use Case: Useful in exploratory research where little is known about the setting. استغلال الفرص المفاجئة أثناء البحث، مفيدة في الدراسات الاستكشافية.

Purposive Sampling

•The researcher intentionally selects participants who are most likely to provide relevant data.

• Purposive or judgement sampling is a frequently applied conceptually-driven approach.

•Selection Criteria: Can include demographics(age, gender,socioeconomic status) or specific attitudes/beliefs.

Forms of Purposive Sampling

Types:

- Maximum variation sampling
- Deviant sampling
- Typical case sampling
- Homogenous sampling
- Critical case sampling
- Confirming and disconfirming sampling
- Stratified purposeful sampling
- Snowball sampling

Maximum Variation	اختيار أشخاص مختلفين جدًا للكشف عن القواسم المشتركة.
Homogenous	اختيار أشخاص متشابهين (مثلاً، طلاب سنة أولى في الطب).
Deviant/Extreme	حالات متطرفة (أفضل أو أسوأ أداء) لفهم أعمق.
Typical Case	حالات "نمطية" تمثل الوسط العام.
Critical Case	حالات مهمة جدًا قد تُعمم على غيرها.
Confirming/ Disconfirming	اختيار من يؤكد أو يناقض النتائج لتعزيز مصداقية التحليل.
Stratified Purposeful	تقسيم المشاركين إلى مجموعات ومقارنة الاختلافات بينهم.
Snowball Sampling	مشارك يرشح مشاركًا آخر — مفيد للمجموعات "المخفية" مثل مدمني المخدرات.

Maximum Variation Sampling

•Selects participants with diverse characteristics to identify common themes across a varied sample.

→ Entails the recruitment of study participants who vary widely on the dimensions of interest with the aim of identifying central themes/elements that hold true across the diverse sample.

- ✓ This allows for multiple perspectives of individuals to be presented that exemplify the complexity of the world.

Homogenous Sampling

•Selects participants with similar backgrounds/experiences.

•Use Case: Often used for focus groups.

Deviant Sampling

•Focuses on extreme or outlier cases (e.g., best/worst performers) to gain deep insights.

- ✓ such as crises, exceptions or remarkable failures or successes, in an attempt to glean as much information relevant to the research question as possible from each case.

• *For example*, in a study of performance of graduate students, a researcher can select the best and the worse students in class and compare the causes of their performances

Typical Case Sampling

•Selects average or typical cases to build a profile of the norm.

•Requirement: Consensus on what is “typical” is needed, often through expert consultation.

- ✓ General agreement on what constitutes a 'typical' case is required for this approach.

Critical Case Sampling

•Selects cases that can provide the most generalizable information.

→ selects cases that will produce critical information with maximum generalisability of information to other cases.

→ Given that the researcher correctly identifies what makes a 'critical case', knowledge gained may be applied to other cases. التعميم

•*Example*: Testing instructions with engineers—if they struggle, likely everyone will.

Confirming & Disconfirming Sampling

•Mixes cases that confirm and challenge existing findings to deepen understanding and credibility.

- The confirming cases serve to add depth, detail and enhance credibility while the disconfirming cases challenge the prevalent narrative and may bring to light alternative interpretations.
- This approach is generally utilised at later stages of a study when preliminary fieldwork has already established what qualifies as a 'confirming case'
-

Stratified Purposeful Sampling

•Selects participants from specific sub-groups to compare variations across these groups.

Snowball Sampling (FRIEND OF FRIEND)

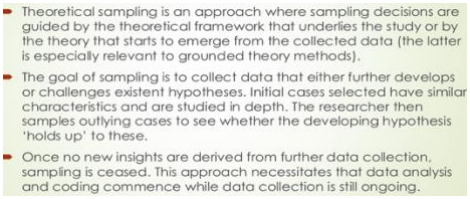
- Participants refer others
- This is especially useful when the studied population is hard to access or may not publicly signal that they belong to the group of interest (e.g. drug-users).

Theoretical Sampling

•Sampling is guided by the emerging theory or theoretical framework.

•Process: Start with similar cases, then include outliers to test the theory.

•End Point: Stop when no new insights emerge (data saturation). تُستخدم في دراسات النظرية المتجذرة،يتم اختيار المشاركين بناءً على ما تظهره النظرية الناشئة، تنتهي عندما لا تظهر أفكار جديدة (تشبع البيانات).



Flexibility in Qualitative Sampling

•A flexible research and sampling design is an important feature of qualitative research, especially when little is known about the research setting.

•A flexible design allows for reflection and preliminary analysis, adapting as the study unfolds.

عند وجود معلومات محدودة عن البيئة أو الظاهرة المدروسة: في الدراسات الاستكشافية، قد لا يعرف الباحث مسبقًا من هم المشاركون الأكثر أهمية، لذا، يبدأ بعينة مبدئية ثم يوسعها أو يغيّرها بحسب ما يظهر من بيانات أو أنماط، ايضًا للسماح بالتحليل الأولي والمراجعة المستمرة: البحث النوعي عادة لا ينتظر حتى النهاية ليبدأ التحليل، أثناء جمع البيانات، يمكن للباحث أن يلاحظ أفكارًا أو قضايا جديدة تدفعه لتعديل العينة أو إدخال مشاركين جدد

File10Qualitative Research Proposal Writing

Introduction

•Qualitative Methodology: Used when little is known about a topic, the context is not well understood, or the phenomenon is not quantifiable. عندما يكون هناك نقص في المعلومات المتوفّرة حول الموضوع، أو عندما يكون السياق غير واضح، أو عندما يصعب قياس الظاهرة بشكل كمي. أي أنها مناسبة للموضوعات التي تتطلب فهمًا عميقًا للسلوكيات، التجارب، أو المعاني من وجهة نظر المشاركين

•Researcher's Approach: Requires clarity on research issues but openness to adapt as the study progresses. يتطلب من الباحث أن يحدّد القضايا أو الأسئلة البحثية الأساسية منذ البداية، لكنه في نفس الوقت يجب أن يكون منفتحًا لتعديل اتجاه البحث بحسب ما يكشفه له الميدان. هذا يعكس الطبيعة التفاعلية والمرنة للبحث النوعي

•*Challenge*: Qualitative proposals are difficult to write because the study often evolves during its execution. من الصعب كتابة مقترح بحث نوعي بشكل تقليدي لأن تصميم البحث قد يتغير ويتطور أثناء تنفيذه. وهذا على عكس البحث الكمي الذي غالبًا ما يكون أكثر ثباتًا منذ البداية

•Contrast with Quantitative Research: Quantitative researchers often know what they want to find out, while qualitative researchers may not know what will drive the inquiry until the study is underway. الباحث الكمي يبدأ بحثه بأسئلة محددة وواضحة، بينما الباحث النوعي قد لا يعرف بالضبط ما سيوجهه في بحثه إلا بعد أن يبدأ بجمع البيانات والتفاعل مع المشاركين

•Perspective: Qualitative research accepts multiple ways of understanding the world and prioritizes participants' perspectives over the researchers. البحث النوعي يؤمن بتعدد الطرق لفهم الواقع، ويعطي الأولوية لوجهة نظر المشاركين على حساب فرضيات أو أفكار الباحث المسبقة

- ✓ Qualitative research begins by accepting that there is a range of different ways of making sense of the world (that the truth is only valid in a specific context) and is concerned with discovering the meanings seen by those who are being researched and with understanding their view of the world rather than that of the researcher

Process of the Qualitative Proposal

•Catch-22 Situation: Researchers must describe data analysis methods before knowing what the data will be. يُطلب من الباحث أن يشرح كيف سيحلل البيانات، رغم أنه لم يجمعها بعد ولا يعرف طبيعتها الدقيقة. هذا قد يبدو متناقضًا، لكنه جزء من طبيعة البحث النوعي

- In response to this situation, (Morse and Field)remark that "clearly, developing a rigid plan for a qualitative project, including detailed plans for data collection and analysis, becomes impossible when writing qualitative proposals". Unlike positivist research, there is no single accepted framework for a qualitative rescarch proposal.

•No Single Framework: Unlike quantitative research, qualitative proposals lack a standardized structure. لا يوجد نموذج موحد لكتابة مقترح البحث النوعي كما هو الحال في البحوث الكمية. لذا يُتوقع من الباحث أن يبني هيكله الخاص بما يتناسب مع موضوعه

Key Questions for Proposals:

1. Why is the research interesting?لماذا هذا البحث مهم أو مثير للاهتمام؟
2. Is the design credible and achievable?هل التصميم البحثي واقعي وقابل للتنفيذ؟
3. Is the researcher capable?هل الباحث مؤهل وقادر على تنفيذ هذا البحث؟

Guidelines: Be practical, persuasive, make broader links, aim for clarity, and plan before writing.

Key Guidelines for Proposal Writing

•Be Practical: Show how the research addresses a real problem or issue, for example, staff morale or patients' perceptions of quality of care.

•Be Persuasiveالاقناع: Argue the importance and value of the research; convince others it is worth supporting.

- ✓ As a researcher you must be balanced, with a realistic understanding of what you can achieve
- ✓ You convince people of the value of your work by showing them how your research will make a difference to the world, or by identifying a dilemma in existing theory which your research will help resolve

•Make Broader Links: Demonstrate awareness of wider implications, such as policy or practice improvementsاربط البحث بسياقات أوسع: مثل التأثير على السياسات أو الممارسات المهنية، أو إثراء الفهم في مجال معين

• Morse suggests that one way of achieving this is to "place the problem in context to show, for instance, that when we understand this, we will be able to work on that". For example, indicate how your research will improve practice or influence policy

•Aim for Crystal Clarityلغة واضحة: Use simple, concise (short), jargon-free language so non-specialists can understand.

- ✓ Morse argues that the researcher should resist the temptation to lapse into pure jargon, as "some of the reviewers will be from other disciplines, and the proposal writer should assume nothing and explain everything".

•Plan Before You Write: Manage time effectively and ensure the proposal reflects a well-thought-out plan.

• Remember the saying "If you fail to plan, you plan to fail."

- It is important that the writer plans the process, as the proposal should not only demonstrate that it is based on an intelligent understanding of the existing literature, but it must also show that the writer has thought about the time needed to conduct each stage of the research (Silverm).
- Time management is embedded in the planning process.

Structure of the Qualitative Proposal

Essential Components:

- Cover page
- Abstract
- Introduction
- Literature Review
- Research Problem and Questions
- Research Objectives
- Research Design
- Research Methods
- Ethical Considerations
- Dissemination Plan
- Timeline
- Budget
- Appendices

Cover Page

• Formal documents usually have a cover page.

- If no format is provided, create a cover page and include the following, title, researcher's name and affiliation, signatures, and contact details. صفحة الغلاف تحتوي على عنوان البحث، اسم الباحث، المؤسسة أو الجهة المنتسب لها، التوقيعات (إن لزم)، ومعلومات الاتصال
- The affiliation will include the type of degree, for example Master in Public Administration, as well as the name of the university where the study will be conducted.
- Lines for the signatures of the researcher as well as the university authorities.
- Contact detail information - address, phone and fax numbers, and e-mail address.

Abstract

•A concise summary (250–300 words) covering the research problem, question, purpose, objectives, design, and methods. Should include up to five keywords and may use structured headings. ملخص قصير (عادة بين 250–300 كلمة) يشمل: المشكلة البحثية سؤال البحث هدف البحث الأهداف التفصيلية، التصميم والمنهجية، كلمات مفتاحية (حتى 5 كلمات)، قد يُكتب باستخدام عناوين فرعية لتنظيم المحتوى بوضوح

- First impressions count, and this is also true for the abstract,as this will be the first part that the reviewers read. It is advisable to leave the writing of the abstract until the end, as it will be casier to write after you have clarity of the research process.

- The inclusion of no more than five keywords is advisable at the end of the abstract.
- Structure can be given to the abstract by adding headings, i.e. Background, Aim (Purpose and specific objectives), Data Source, Method, followed by Keywords.

Introduction

•Captures attention, introduces the research question, explains its significance, and sets the context. Should answer: Who cares? What do we know? What's missing? How will this research add value?من يهتم بهذه المشكلة،ماذا نعرف عنها،ما الذي لا نعرفه، كيف سيساهم هذا البحث

- Begin with something interesting that immediately catches attention.
- Burns and Grove provide questions that can be used to assess the significance of the study: (i) Who has an interest in the domain of inquiry? (ii) What do we already know about the topic? (iii) What has not been answered adequately in previous research and practice? And (iv) How will this research add to knowledge, practice, and policy in this area?
- Furthermore, the introduction sets the scene and puts the research in context

Review of the Literature مراجعة الادبيات

•Cites relevant sources to justify the research need. Should critique existing research, describe search methods, and explain how the new study addresses gaps. تستعرض الدراسات السابقة ذات الصلة، وتُبرز الفجوات في المعرفة. يجب أن: تنتقد المصادر لا أن تكتفي بسردها، توضح كيف تم البحث عن الدراسات (مصادر وقواعد بيانات)، تبيّن كيف سيسد البحث الجديد هذه الفجوات

- The literature review provides a theoretical context for the study, but is not a conceptual framework, as it does not drive the study or provide an outline for the analysis مراجعة الأدبيات توفّر خلفية نظرية للدراسة، أي أنها توضّح ما كُتب سابقًا في الموضوع وما هي النظريات أو النتائج المرتبطة به، لكنها ليست إطارًا مفاهيميًا، لأنها لا تُستخدم لتوجيه الدراسة مباشرة أو لتحديد كيف سيتم تحليل البيانات
- This involves describing the computer search engines used and the keywords entered into those engines For example: "Searches were performed using the following resources: Nexus database, South African journal'. عند كتابة مراجعة الأدبيات، من المهم ذكر كيف تم البحث عن الدراسات السابقة، هذا يشمل:أسماء قواعد البيانات الإلكترونية ،الكلمات المفتاحية التي استُخدمت في البحث
- The literature review is not necessarily a separate heading, as it could be integrated in the introduction, providing a rationale for the planned study مراجعة الأدبيات ليست بالضرورة أن تُكتب كقسم منفصل بعنوان مستقل،بل يمكن دمجها ضمن قسم المقدمة

Research Problem and Research Question

•Clearly defines the problem and presents the main research questions. The problem should be specific and manageable. توضيح دقيق للمشكلة البحثية، وطرح الأسئلة الأساسية. يجب أن تكون المشكلة: محددة بدقة،قابلة للدراسة والتحليل في الإطار الزمني والإمكانيات المتوفّرة

- As research is a logical process, the research problem is a synthesis ot the introduction and literature review; in other words, it is a "diagnosis "of the problem. The problem can be broad, but must be specific enough to convince the reviewers that it is worth focusing on

- the research questions clearly delineate the research (sometimes with sub-questions), and the scope of the research questions(s) needs to be manageable within the time frame and context of the study

Research Purpose and Objectives

•States the overall aim and specific objectives. The purpose should be clear, concise and indicate the type of study (e.g., descriptive, explanatory). غرض البحث والأهداف

الغرض (Purpose): الهدف العام من الدراسة، الأهداف (Objectives): خطوات أو جوانب محددة لتحقيق الغرض

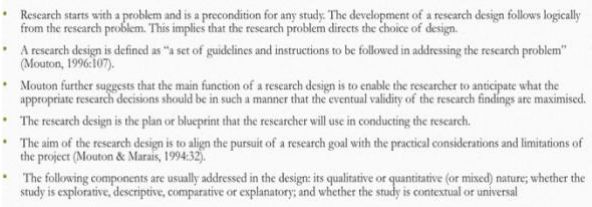
*Example of Purpose and Objectives…*For instance, developing best practice guidelines for HIV counseling during pregnancy, with objectives to explore influencing factors, describe current practices, and review evidence. الغرض: تطوير إرشادات للممارسات الفضلى في تقديم المشورة لمرضى الإيدز خلال الحمل، الأهداف: استكشاف العوامل المؤثرة، وصف الممارسات الحالية، مراجعة الأدلة العلمي

Research Design

•Outlines the plan for addressing the research problem. Specifies qualitative/quantitative nature, and whether the study is exploratory, descriptive, comparative, or explanatory. Contextual details are crucial in qualitative research.

- Qualitative studies are always contextual, as the data is only valid in a specific context.
- The researcher can then follow with a short description of each component.
- In the description of a contextual study it is important to include a description of the context or setting in which the research will be conducted. Also explain why this setting was chosen.

يشرح كيف سيتم تنفيذ البحث. يجب توضيح: هل هو نوعي أو كمي؟، نوع الدراسة (استكشافية، وصفية، مقارنة، تفسيرية)، البيئة والسياق مهمان جدًا في البحوث النوعي



Research Methods

•The research design will influence your decisions about research methods.

•Key steps in research methods include: defining the population and sample, data collection, ensuring rigor, and data analysis.

Population and Sample

•Population refers to all elements (individuals, objects, or substances) meeting specific criteria for inclusion.

•The composition of the population (N) should be described, including selection methods and entry into the research context.

•Sample is a subset of the population chosen for the study.

•The sampling technique must be named and justified (e.g., purposive sampling), with inclusion/exclusion criteria and projected sample size (n) specified.

•Example: A study population might include community health centers, professionals, and surrounding communities.

Data Collection

•The researcher must clarify the research aim and how data will be collected.

•The approach can be inductive (no explicit conceptual framework) or deductive (clear conceptual framework guiding the process).

•Inductive strategies use a central theoretical statement, while deductive strategies involve a rigid conceptual framework for analysis and interpretation.

- In the deductive strategy the rescarcher embarks upon a rescarch project with a clear conceptual framework in mind. This may be a model, a theory or a typology.

- The use of a deductive strategy leads to a relatively rigid manner of conceptualisation, operationalisation, and data collection, and will ultimately constitute the frame of reference for analysis and interpretation (Mouton)

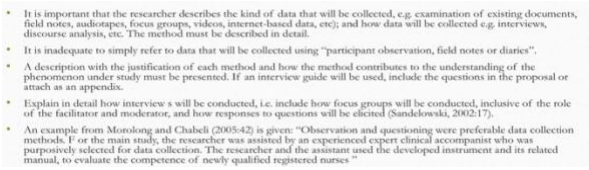
Data Collection

•Specify the type of data (e.g., documents, field notes, audiotapes, focus groups, videos, internet data) and collection methods (e.g., interviews, discourse analysis).

•Methods must be described in detail and justified for their contribution to understanding the phenomenon.

•If interviews or focus groups are used, the process, including the roles of facilitators and moderators, should be explained.

•Example: Observation and questioning with the help of an expert, using a developed instrument for evaluation.



Rigor (Soundness of the Research)

• Rigor must be reflected throughout the proposal to ensure quality and trustworthiness.

Data Analysis

•Describe the intended data analysis procedures (e.g., coding, sorting).

•Explain data reduction steps, including field note write-ups, transcription, and use of computer programs.

• For the description of data analysis, relevant methods with citations must be included.

Ethical Considerations

•Qualitative research often faces unique ethical challenges due to the intimate nature of data collection.

•Ethical considerations include protecting participants' rights (self-determination, privacy, autonomy, confidentiality, fair treatment, protection from harm), obtaining informed consent, and securing institutional ethical approval.

•Researchers must provide detailed information on how these aspects will be addressed.

- It is very important that the researcher take special care in ensuring that ethical standards are met.

Dissemination Plan

- The researcher should provide a condensed description of the plan that will be utilised to disseminate results, i.e. publication in peer-reviewed journals and paper or poster presentations at conferences.

Timeline

•The timeline is a detailed schedule for completing research activities, including duration and sequence.

•Can be presented as text, table, or Gantt chart.

•Researchers should realistically estimate timeframes, often tripling initial estimates to account for delays, especially in qualitative research.

- ✓ Qualitative researchers are often very optimistic about the time to be allowed for the research activities, but the qualitative researcher can experience numerous delays, for instance, delays with interviews and the time-consuming process of qualitative data analysis.
- ✓ Morse and Field advise that the researcher should estimate how long cach activity will take and then triple the time. Such leeway is important when funds are requested, to ensure that there is adequate funding for staft and for the completion of the project.

Budget

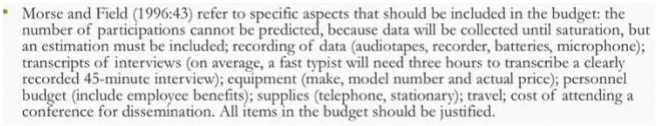
•The belief that qualitative research is inexpensive .

✓ A notion which interferes with the positive perception of qualitative inquiry is the idea that qualitative research is inexpensive to conduct

•Budgets should anticipate all costs, including unpredictable events.

•Include estimates for sample size, data recording (equipment, transcription), personnel, supplies, travel, and dissemination.

•All items must be justified.



Appendices

Appendices support the proposal and may include informed consent forms, ethical approval verification, letters of approval/support, and CVs of the research team.

- Appendices are documents that support the proposal and application.
- The appendices will be specific for each proposal, but documents that are usually required include: informed consent form; telephone consent; verification of ethical approval; letters of approval from research site; letters of support (in case of funding application); curricula vitae of researcher (principal investigator) and others members of the research team.

تمّ بحمد الله تعالى

By: ayah freihat