

Research Concepts

This study relies on two multi-faceted research concepts that need to be clarified before moving forward. The first idea is what experience constitutes being classified as a veteran of the U.S. Armed Forces. Is it necessary for one to have served in combat to be deemed a veteran or is peacetime military service sufficient? Are those service members who received dishonorable discharges veterans? The second concept deals with the notion of civic engagement, which admits of multiple interpretations and modalities. I define these ideas in greater detail below.

Veteran

The U.S. federal government defines a veteran as any person who has served honorably on active duty in the armed forces of the United States. I considered three additional characteristics when selecting individuals for this research: level of education, period of service and military branch.

VSB identified level of education as a key contributor to the likelihood of civic participation (Verba, Schlozman, and Brady, 1995). In the majority of cases, military officers have completed more education than have non-commissioned soldiers. While officer training may be conducive to community engagement, their level of education could lead to spurious conclusions regarding the role of civic capacities in military training. For this reason, I elected to focus on enlisted veterans.

The second dimension with which I was concerned is period of service. I sought to limit my study to former Marines who had been out of the Corps for at least two years. According to Yonkman and Bridgeland, “the greatest increase in volunteering among OIF/OEF veterans occurred when they had been home at least two years. While only 28

percent of veterans who were home less than six months volunteered, 47 percent of veterans who were back one to two years volunteered and 61 percent of veterans who were home two or more years volunteered” (Yonkman and Bridgeland, 2009, p. 16).

According to Yonkman and Bridgeland,

Veterans go through a transition home that is unique to their circumstances.

Comparing when a veteran started volunteering with when they arrived home, however, gave a strong indication of when organizations should make “the ask.”

Veterans need time to get settled and organizations need time to build their relationships with veterans. The greatest increase in volunteering among OIF/OEF veterans occurred when the veteran had been home two years or more. Making the initial ask when the veteran has been home around a year indicates that many more veterans will be serving by the two-year mark. This gives the veteran time to decompress and acclimate to being home, but is not too great a time gap before they are given a meaningful opportunity to serve again (Yonkman and Bridgeland, 2009, p. 23).

Finally, as noted above, I focused on Marine Corps Basic Training and Marine veterans due to limited time and financial resources.

Civic Engagement

Civic engagement is a multi-dimensional concept that evokes dissimilar things among different people, depending largely upon their theoretical frame and normative assumptions. The American Psychological Association has broadly defined the term as, “individual and collective actions designed to identify and address issues of public concern” (Delli Carpini, 2006, p. 12). The 2010 National Conference on Citizenship

report, *Civic Life in America: Key Findings on the Civic Health of the Nation*, claimed, “the term ‘civic life,’ also used interchangeably with the term ‘civic engagement,’ can be used to describe diverse activities and generally includes activities that build on the collective resources, skills, expertise, and knowledge of citizens to improve the quality of life in communities” (National Conference on Citizenship, 2010, p.1). Thomas Ehrlich has defined the concept as, “working to make a difference in the civic life of our communities and developing the combination of knowledge, skills, values and motivation to make that difference. It means promoting the quality of life in a community, through both political and non-political processes” (2000, pg. 9).

Meanwhile, Cliff Zukin, Scott Keeter, Molly Andolina, Krista Jenkins and Michael X. Delli Carpini have defined civic engagement as, “organized voluntary activity focused on problem solving and helping others. It includes a wide range of work undertaken alone or in concert with others to effect change” (2006, p. 63). Zukin et al. have also argued that working with others to address a community problem, raising money for charity through a walk/run or by any other means or actively participating in a group or association, should also be included as measures of civic participation (2006, p.66). In light of these perspectives, I employed a broader definition of civic engagement that includes both political and non-political involvement: engagement as individual or collective action taken to address problems of public concern.

Study Limitations

This inquiry was limited to Marine Corps Basic Training and Marine Corp veterans. There are significant differences as well as similarities among the immersion/orientation programs of the major branches of service (Army, Navy, Marine

Corps, Air Force). Examining the characteristics of all four services' efforts would likely require a multi-year study or several independent research projects. Another reason to analyze only the Marine training experience is the fact that I have undergone Marine Corps Basic Training. That familiarity helped me interact with key informants and assisted in developing questions that guided the semi-structured interviews I undertook for this effort.

My possible bias as an investigator was a potential limitation of this analysis. While my knowledge of the Marine Corps helped me gain entry to the community and proceed with the study, that acquaintance could also have influenced my results. I adopted several strategies to address this potential. The first precaution was to adopt a phenomenological research design that focused on the understandings of study participants and that bracketed my individual experience. The second step I undertook to limit possible preconceptions was to triangulate my data sources to ensure consistency. In addition to conducting interviews with drill instructors and veterans, I also thoroughly reviewed Marine Corps training manuals. Finally, I utilized my advisory committee as a sounding board throughout the research and writing process to help to ensure that I was not inserting my own views into the project inadvertently.

I encountered several of the standard limitations highlighted in the literature regarding qualitative research, including the time-consuming nature of interpreting such data, the possibility that this form of inquiry is not as well-accepted as quantitative research in certain academic communities, issues linked to ensuring interviewee confidentiality and the difficulty of presenting findings in a visual way. I was able to address those of these factors within my control by careful planning.

Another practical limitation with which I wrestled in developing this study was time and money. I completed this analysis within one year, an abbreviated period of time. And there is always the limitation of money. I was not able to secure external funding for this project and so had to rely largely on my own resources as well as those I could obtain from the university, to complete it.

Dissertation Outline

This study contains seven chapters and six appendices. This first chapter provides a brief introduction to the issue of veterans and civic engagement and sketches the purposes of the study. It also outlines the effort's research questions and limitations. Chapter 2 describes this investigation in greater detail, including the specific methods employed, the sample, the forms of data collection, how information was analyzed, the strategies used to increase validity and reliability, potential ethical issues and a statement describing my background. Chapter 3 presents a review of the civic engagement literature that, in part, motivated this inquiry. Chapter 4 provides an overview of U.S. Marine Corps culture, focusing specifically on briefly describing the evolution and central characteristics of that service's basic training experience. Chapter 5 offers the findings I gleaned from the study and provides a composite summary, illustrated with quotations from individual interviews, which reflects the context from which those ideas emerged. Chapter 6 discusses this study's implications for theory development, pedagogy, public policy and professional practice. The final chapter offers conclusions and includes a section on future research. I have included the Virginia Tech IRB-approved informed consent forms, interview protocols, an annotated list of tables and figures and the 2014 U.S. Marine Corps Commandant's Professional Reading List as appendices.

Chapter 2

Research Design and Methods

Research Design

This project explored whether, how and why Marine Corps Basic Training instills values and civic skills conducive to community involvement. I addressed the study's research questions through the individual perceptions of a sample of Marine Corps drill instructors (DIs) and veterans. This analytic aim suggested the appropriateness of a qualitative research design. Creswell has observed that

The research process for qualitative researchers is emergent. This means that the initial plan for research cannot be tightly prescribed, and all phases of the process may change or shift after the researcher enters the field. The key idea behind qualitative research is to learn about the problem or issue from the participants and to address the research to obtain that information (Creswell, 2009, p. 176).

Creswell has also argued,

Qualitative procedures demonstrate a different approach to scholarly inquiry than methods of quantitative research. Although the processes are similar, qualitative procedures rely on text and image data, have unique steps in data analysis and draw on diverse strategies of inquiry. The strategies of inquiry chosen in a qualitative project have a dramatic influence on the procedures (Creswell, 2009, p. 173).

My primary strategy of investigation for this effort was phenomenology, an analytic approach that seeks to understand the lived experiences of individuals

concerning a particular phenomenon (Creswell, 2009, p. 13). Groenewald has suggested that the operative word in phenomenological research is “describe” (2004, p. 3). The phenomenon I was interested in describing was Marine Corps basic training’s development of values and skills that may encourage civic involvement

Phenomenological inquiry involves studying the experiences of a small sample through extensive engagement to identify patterns and relationships of meaning that illuminate the investigator’s research question(s). This method requires the investigator to bracket his/her knowledge of the concern(s) in question. In my case, this required me to focus on study participant descriptions of military training and to refrain from imposing my own views concerning the subject.

Interpretive Paradigm

Bailey (2007) has noted that qualitative researchers espouse interpretivist ontological and epistemological commitments. An interpretivist ontological commitment holds that there is no objective social reality, but instead multiple ones. Analysts often contrast the interpretivist paradigm with “positivists” who seek to approach questions or concerns in as value-free a manner as possible. However, because the interpretivist paradigm acknowledges multiple social realities and therefore epistemological perspectives, including those of the qualitative researcher, the various values, beliefs and behaviors of all engaged in a study necessarily play an integral part in the inquiry. Therefore, it is incumbent on the analyst to reflect on his or her perspective and values in a process known as reflexivity. Qualitative scholars must make their values transparent when reporting on their inquiry.

Denzin and Lincoln (2007) have stressed that an interpretive epistemology has three principal features or characteristics. First, interpretivists view human action as inherently meaningful. Secondly, such researchers demonstrate a commitment to knowledge revealed in the social world. Finally, those adopting this stance fall within the neo-Kantian philosophical tradition, which emphasizes the importance of human subjectivity in the creation of knowledge.

According to Denzin and Lincoln (2007) qualitative research can involve the study of many different types of materials, including cases, interviews, visual texts and others. Based on their role in the interpretation of such items, Denzin and Lincoln describe the qualitative researcher as a *bricoleur*, who produces a *bricolage* or a montage of different representations fitted together for a specific purpose. The *bricoleur's* role as producers of an emergent design changes as different methods and perspectives are added to the puzzle (2007, p. 36).

Sampling

I used two sampling strategies in this study. My initial sample was purposive, as I selected those individuals targeted for examination based on my judgment and the aims of the inquiry. Additionally, I employed the snowball method as a second strategy by which to identify possible study participants. My interviewees consisted of 7 current Marine Corps drill instructors and 10 enlisted Marine veterans who had been separated from active duty for at least two years. The drill instructors described their pedagogical aims and methods regarding the development of the values and skills discussed by Nesbit (2011) and Yonkman (2009) in interviews with me. Similarly, Marine Corps veteran

interviewees provided their perceptions of whether and to what extent basic training encouraged and instilled those values and skills.

An important consideration concerning both of these groups was to gain access to the members of each. Shenton and Hayter (2004) have argued there are six important strategies for gaining entree to organizations and key informants for qualitative research projects: demonstrating your credentials, agreeing to share findings with participants, answering any questions openly and honestly, emphasizing any personal and professional links you have with the organization you are approaching and being receptive to suggestions from those interviewed. I employed all of these tactics in my investigation.

I first sought to gain access to the drill instructors by contacting my former platoon sergeant. Sergeant Major Jean-Paul Courville recently retired as the First Sergeant of the Marine Corps Drill Instructor School at Parris Island, South Carolina. I had hoped to use his contacts to facilitate the visit. In case he was not able to assist, I planned to contact the Recruit Depot commander directly to provide my background, credentials and a summary of the project's research aims and request assistance.

To gain access to veterans for interview, I first approached members of the Marine Corps League (MCL), a national organization in which:

Members join together in camaraderie and fellowship for the purpose of preserving the traditions and promoting the interests of the United States Marine Corps, banding together those who are now serving in the United States Marine Corps and those who have been honorably discharged from that service that they may effectively promote the ideals of American freedom and democracy, voluntarily aiding and rendering assistance to all

Marines, Fleet Marine Force (FMF) Corpsmen and former Marines and FMF Corpsmen and to their widows and orphans; and to perpetuate the history of the United States Marine Corps and by fitting acts to observe the anniversaries of historical occasions of particular interest to Marines (Marine Corps League. Retrieved April 12, 2013 from www.mcleague.com).

There are 23 Marine Corps League chapters, known as detachments, in Virginia. I contacted three of those to identify service veterans who met my study's eligibility criteria and were willing to speak with me regarding their perceptions of basic training, civic skills and values. I contacted the relevant commanders of the groups in the New River Valley in Radford, Yorktown in Newport News and Virginia Beach. I chose the New River Valley chapter based on its geographic proximity to Blacksburg and selected the Yorktown and Virginia Beach chapters based on their large size and membership diversity.

After contacting the Marine Corps Recruit Depot and Marine Corps League detachments, I intended to employ random stratified sampling to select individual participants from among the drill instructors and veterans. This strategy allows for greater precision, guards against an unrepresentative result and provides sample points to indicate potential areas of research regarding separate analyses of sub-groups.

I intended to stratify the drill instructors group into five bivariate categories: occupational specialties (combat arms vs. non-combat arms), gender (male/female), combat experience (yes/no), level of education (high school vs. at least some college), and level (senior/junior). Ideally, I hoped the Recruit Depot would be willing to provide a

roster containing this background information. I planned then to separate the instructors under these 10 possibilities and randomly select one from each category to interview. Based on this sorting process, I planned to contact the drill teachers to schedule interviews with each. If any of the initial 10 could not participate, I intended to use the same method to select another individual with the same classification to fill that spot or spots. I chose drill instructors not responsible for a platoon of recruits at the time of interview,⁴ as those individuals were more likely to be able to participate in the study.

I also intended to utilize random stratified sampling to identify veterans for my project, based on the five bivariate categories of time served (one enlistment vs. multiple), gender (male/female), race (white/non-white), combat experience (yes/no), and level of education (high school/at least some college). I hoped to request a roster from the Marine Corps League detachment commander to acquire this information. In lieu of being able to obtain a membership list, I planned to ask commanders to provide such data. Once I had such information, I intended to separate the veterans among these categories and randomly select one from each group to interview. If any of the initial 10 could not participate, I intended to choose individuals with the same classification at random to fill those spots until my sample was complete.

As previously mentioned, I had also planned to use snowball sampling (Willis, 2007). This method entails asking an initial group of participants to reach out to their networks to expand the sample. I employed this strategy because according to Yonkman and Bridgeland, “it is considered the best method to reach a target population that is normally difficult to identify, such as recent veterans” (Yonkman and Bridgeland, 2009,

⁴ To save time and money, I intended to do all of the interviews at the Recruit Depot in one week. Therefore, identifying drill instructors out of cycle during that week would have expedited the process.

p. 36). If one or more of my research participants were willing to help identify someone who could participate in my study, I meant to explore that possibility.

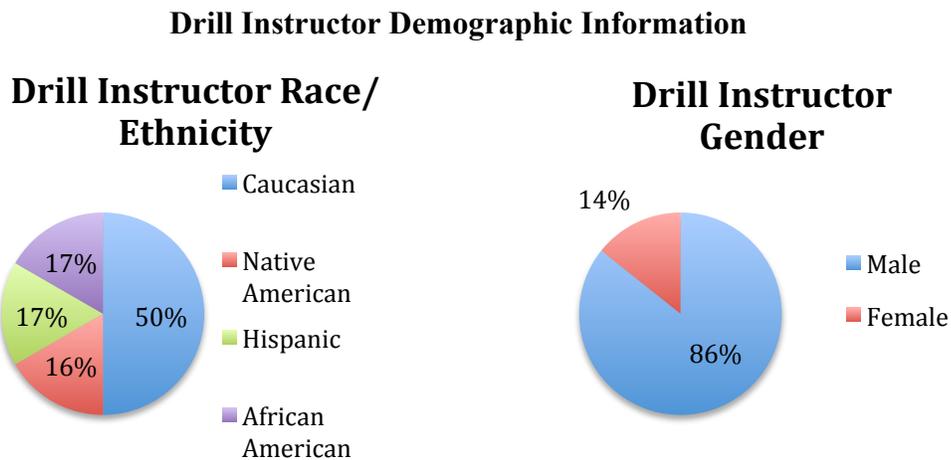
Although my initial sampling procedures seemed well reasoned, I encountered unexpected difficulties. As planned, I contacted my former platoon sergeant in the hope that he would be able to facilitate interviews at the Parris Island Recruit Depot. The sergeant contacted his source at the base and was immediately informed that my request would have to go through official channels. The former leader's contact at Parris Island provided me two points of official contact. One was the facility's Public Affairs Officer (PAO) and the other was the Non-Commissioned Officer (NCO) in charge of base training.

I first emailed the non-commissioned officer because the majority of my work focused on enlisted Marines.⁵ After two attempts to contact him and two weeks, I decided to follow-up with the PAO. Once again, it took several emails and two phone calls to reach her. I was eventually directed to the Marine Corps Institutional Review Board (IRB) to ensure my credentials were legitimate and that the study was appropriately structured. After an email exchange, the Marine Corps IRB representative requested that rather than my coming to the base to interview the drill instructors personally, I provide my questions to the PAO and that individual would choose 10 basic training instructors to address my questions in line with my preferred selection criteria. The base PAO chose a diverse group of drill teachers based on gender, ethnicity, rank and seniority (as I requested). Of the seven DIs who responded, six respondents were male and one was female. Ethnically and racially, those who participated consisted of

⁵ As I noted above, I chose to focus on enlisted Marines because of their educational levels. There are many studies that demonstrate a strong correlation between civic engagement and level of education. I sought to mitigate the strength of this factor by limiting my interviewees to enlisted Marines.

three Caucasians, one Native American, one Hispanic and one African-American. The group was also diverse in terms of geographic origin, hailing from Texas, Pennsylvania, South Carolina, Idaho, Ohio and Puerto Rico. The drill instructor interview group's demographic information appears in Figure 1.

Figure 1



Once I had reviewed this sample and decided it was suitable, I submitted my questions to the PAO and she distributed them to the participating DIs and forwarded their written replies to me.

As initially planned, I contacted the Marine Corps League to locate veterans to participate in my study. I spoke to a representative of the MCL in Blacksburg and one in Virginia Beach. They were willing to help, but again, I encountered unforeseen difficulties. The major challenge for this group was age, as the youngest member of the detachment in Blacksburg was 41 years old. Meanwhile, the Virginia Beach group membership consisted primarily of WWII, Korean War and Vietnam War veterans. The length of time since these individuals had undergone basic training presented a problem

and might call their responses into question. Ultimately, I only found one suitable interview candidate for this study through the Marine Corps League.

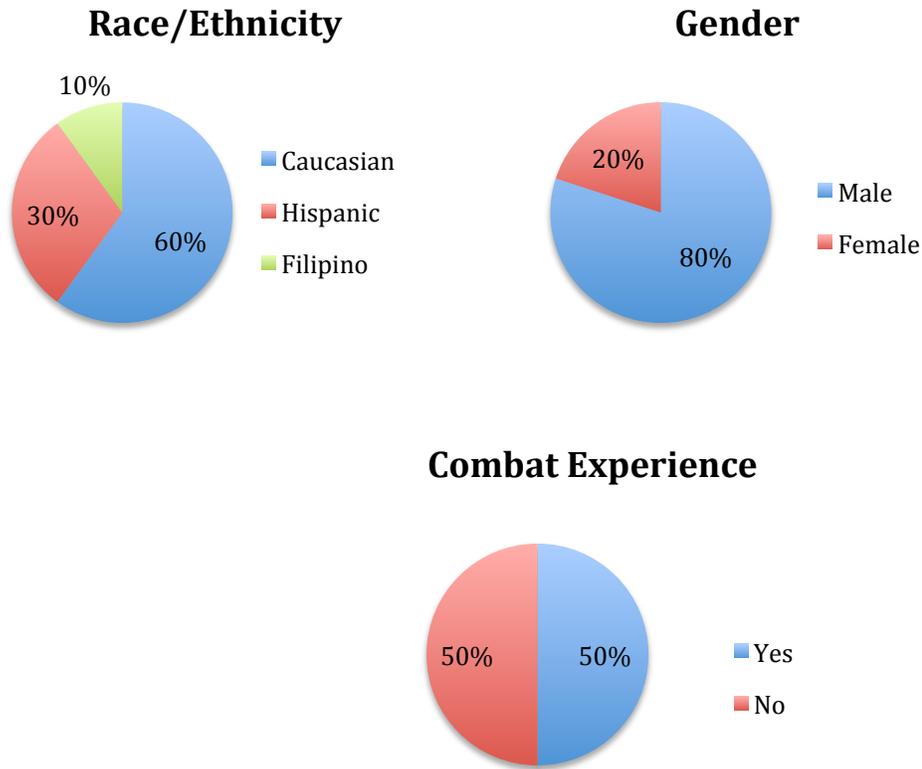
To address this difficulty, I chose to use a different sampling strategy. I currently serve as the scholarship editor for *The Journal of Military Experience* (JME). JME is part of a nonprofit organization called Military Experience and the Arts (MEA). MEA is a national nonprofit, volunteer-run organization whose primary mission is to work with veterans and their families to publish creative prose, poetry and artwork. I distributed a message to MEA members informing them I was conducting a study concerning Marine Corps Basic Training and was seeking former enlisted men's and women's participation. I received several emails from Corps veterans volunteering to join the study. I purposively selected those who fit my initial criteria of being enlisted and having departed the service before Summer 2011 and sent them my recruitment letter. I also employed similar snowball-sampling strategies locally by contacting Leanna Craig, the Blacksburg coordinator of the Virginia Wounded Warrior Program, to locate possible interviewees. Craig provided some names of Marine veterans and I then contacted those individuals to identify possible additional participants. Once again I selected willing would-be participants who fit my initial criteria.

The group of Marine Corps veterans I selected and interviewed in this way proved relatively diverse in regard to race, gender, military occupation and combat experience. The 10 individuals I interviewed consisted of eight males and two females.⁶ Racially and ethnically, my interview sample included six Caucasians, three Hispanics and one Filipino. Five of the Marine veterans had experienced combat and five had not. The demographic information of those I interviewed appears in Figure 2.

⁶ According to the 2012 DOD Demographics Report, women account for 6.7 percent of total Marines.

Figure 2

Marine Veterans' Demographic Information



Setting

According to Denzin and Lincoln, “qualitative research involves an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret phenomena in terms of the meanings people bring to them” (Denzin and Lincoln, 2007, p. 2). As I have suggested, my initial intent was for interviews to occur in a natural setting by speaking with the Marine Corps drill instructors and veterans in person. In the case of the drill instructors, that setting was to have been their workplace, the Recruit Depot on Parris

Island. However, to obtain formal Marine Corps cooperation, the drill instructors provided written responses to my initial and follow-up questions instead. After reviewing the initial DI respondent comments I sent each additional queries. Three of that group provided the additional information I requested.

I had originally intended to interview the veterans who agreed to participate in my study in their homes or other suitable locations they identified. Of the interviews with 10 former Marines that I conducted, four occurred at their places of work, I undertook three in cafes and three took place via Skype. Because I utilized MEA connections (a national journal) to obtain my sample, three of my interviewees resided in distant states: Texas, California and Alaska. I conducted those interviews on Skype.

Role of the Researcher

The first challenge in the inquiry was accounting for my personal biases. I am a Marine Corps veteran and a strong proponent of civic engagement. I also believe that my own military training disposed me positively toward community service. Therefore, it was difficult not to inject my personal views into the study. That said, in many ways, my initial motivation to join the military was self-serving. Enlistment provided me with an opportunity to travel, be adventurous and obtain support for higher education. However, during my service I came to realize that the sense of duty, *esprit de corps* and bonds of community I had developed in the Marine Corps, which had their roots for me in basic training, had come to outweigh the self-serving reasons for which I had originally joined. My recognition of the value of these virtues led me to seek out similar experiences after I returned to civilian life.

My positive military experience could have caused me to read significance into signs or relationships that could lead to spurious conclusions regarding the link between military training and civic involvement. While I attempted to be as reflexive as possible, ultimately I was responsible for interpreting the data and my background and history may have influenced my findings.

Validity

According to Creswell, qualitative validity demands that, “the researcher checks [for] the accuracy of the findings by employing certain procedures” (2009, p. 190). The process Creswell has suggested for increasing the likelihood of study validity includes: triangulation of different data sources, member checking, use of thick descriptions, i.e. portrayals that describe not only the behavior reported, but also its context, clarifying the bias that the researcher brings to the study, presenting discrepant information, peer debriefing and use of external auditors (2009, p. 191). I triangulated my data both through multiple interviews and documents review. I also employed many of Creswell’s other suggestions to promote the validity of this study, including member checking and presenting discrepant information. I sent each interviewee a copy of the finished transcript of our interview to ensure that it accurately depicted their comments. The interviewees did not request any corrections to the transcripts.

Reliability

Reliability represented another research design concern. Willis has suggested the following reliability procedures: “checking transcripts to make sure they do not contain obvious mistakes during transcription, ensuring that there is not a shift in the meaning of codes during the coding process, finding another person who can cross-check codes, and

holding regularly documented meetings among researchers” (Willis, 2007, p. 123). Fortunately the Ph.D. process and meetings with my committee accounted for many of these reliability steps, excepting checking transcripts for errors, which I undertook personally. I also developed interview protocols for both sets of interviews, so that future researchers may employ the instrument, as they wish.

Generalizability

According to Creswell, the hallmark of qualitative research is that of particularity rather than generalizability. My interest was to determine whether Marine Corps Basic Training employs specific pedagogies and tools that seek to inculcate the values and civic skills Yonkman and Bridgeland (2009) and Nesbit (2011) have outlined. Because I worked with a small *n* study, I am not able to generalize from my sample of former Marines to the broader Corps veteran community. However, I can make generalizations from the results of the study to existing analytical frameworks regarding the development of civic skills. Yin (1994) has contrasted analytical and statistical generalization:

In statistical generalization, an inference is made about a population on the basis of empirical data collected about a sample ... an analytical generalization is one in which a previously developed theory is used as a template with which to compare the empirical results of the case study (Yin, 1994, p. 31).

Table 2 above provides the template to which I compared my empirical results. That diagram combines the individual skill claims developed by Yonkman and Bridgeland (2009) and Nesbit (2011) with a typology of civic dispositions developed by Kirlin (2005) and was informed by Verba, Scholzman, and Brady’s inquiry into civic engagement (1995). My initial working hunch was that if my research participants and

documents review confirmed the accuracy of the table's taxonomy, I might be able to make analytical generalizations regarding the results of this study and the arguments posited by Yonkman and Bridgeland and Nesbit regarding a connection between military training and civic skills and values.

Research Ethics

As my research dealt with human subjects, I sought and received approval from the Virginia Tech Institutional Review Board (IRB) to conduct my study. To ensure my research was appropriately framed to obtain informed participation, I used a consent form based on Bailey's recommended items (Bailey, 2000) and the sample available from the Virginia Tech IRB. A copy of the consent form I employed for my study appears as Appendix C. I explained the informed consent process to research participants at the beginning of each interview and shared copy of the consent agreement with each individual well prior to that in-person discussion so that potential interviewees had ample time to consider their involvement in my study. None of the candidates refused to participate in my inquiry.

Research Methods

My primary research method was in-depth semi-structured interviews.⁷ Herbert and Irene Rubin have described this strategy as "responsive interviewing" because "researchers respond to and then ask further questions about what they hear from the interviewees, rather than rely exclusively on predetermined questions" (2012, p. 11). The core of responsive interviewing involves formulating and asking three types of queries: main questions, probes and follow-up questions. Main queries address the overall

⁷ While I utilized a phenomenological strategy of inquiry, I did not conduct phenomenological interviews.

research problem and structure the conversation; probes help manage the interview and elicit details; and follow-up questions explore and test ideas that emerge as the conversation proceeds.

Creswell has recommended long interviews with each interviewee, and including at least 10 people in the pool for a thorough phenomenological study (Creswell, 1998, p. 76). I interviewed 7 Marine Corps Drill Instructors, with three follow-up interviews, and 10 Marine Corps veterans for this inquiry. I developed a set of interview questions sufficiently open-ended that allowed conversations with these principals to proceed in an organic way. That instrument provided the space necessary to attain a nuanced sense of whether and how Marine Corps basic training provides civic skills and values according to the perceptions of the particular individuals interviewed. The questions I employed appear as Appendices A and B.

I also reviewed documents for this research project, primarily the manuals from, and about, Marine Corps Basic Training. Marine Corps recruits are issued a 336-page handbook, known as the *Guidebook for Marines*. This text discusses every aspect of a Marine's life, from basic hygiene to Corps history to explosives, squad tactics and battalion weapons. I examined other training documents, too, including official Marine Corps Training Command guidance (aimed at assisting DIs) for insights they revealed about skills and values development in the Marine Corps as well as to provide valuable perspectives into the history and context of the cases I investigated. I used these materials to triangulate and test findings from my interviews, as well as to refine my understanding of the study's context.

Data Collection

I employed semi-structured interviews and documents review for my data collection, as I have noted. I used two strategies to ensure safe storage of information for analysis. The first was audio recording. Taking written notes is important and I often did so, but frequently while talking with someone I become immersed in the conversation and may miss important insights. Audio recording guards against the possibility of not capturing vital information. Groenewald has suggested that analysts should listen to interview recordings as soon as possible after each such conversation to take notes and transcribe the exchange verbatim in order to “allow the voices of the participants to speak” (Groenewald 2004, p. 17). Groenewald has also cautioned investigators to be prepared for equipment failure and varying environmental conditions. I brought a back-up recorder to all of my interviews to guard against this concern. I stored interviewee identification, a master list of pseudonyms and interview transcripts in separate password-protected files on my home computer.

I prepared four types of field notes—observational, theoretical, methodological and analytical memos—and these constituted an additional source of data. Emerson, Fretz, and Shaw (1995) have described analytical memos as, “a device to pull yourself through the inductive process of research. An analytical memo is a way station, or rest area, on the analysis route” (Emerson 1995, p. 27). Lofland (1995) has observed that such efforts are, “write-ups or mini-analyses about what you think you are learning during the course of your evaluation. They can be a couple of sentences or a few pages in length; whatever is needed to flesh out concepts and patterns that may be emerging in the data” (Lofland 1995, p. 52).

I kept a journal during the project that contained all of my field notes. My observational reflections captured the actions, settings and conversations that framed the study as it unfolded. I used theoretical notes to document my reflections during the study, which contributed to describing the broader portent of my effort. I also took methodological notes that concerned the efficacy of my approach and challenges encountered in undertaking my research.

Groenewald has cautioned that field notes constitute a step towards data analysis. He has argued that because, “the basic datum of phenomenology is the conscious human being, it is very important that the researcher must, to the greatest degree possible, prevent the data from being prematurely categorized or pushed into the researcher’s bias” (Groenewald 2004, p. 17). I strove to be cognizant of this counsel while writing my field notes.

Table 3 presents the project timeline I developed for data collection and analysis.