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Pernilla Pergert, RN, Ph.D.

Abstract

The experience of minus mentoring in learning classic grounded theory (CGT) is shared by many people over the world. The aim of this article is to share experiences of learning and using CGT. Data for the article included methodological discussions in the author's thesis and articles, as well as memos. Consequences of learning grounded theory by doing are presented in the form of challenges and lessons learned but also some rewards. Challenges and lessons learned include sampling-confusion, delimiting-disregarding, judging saturation and conceptual language-struggling. Rewards include trusting the method, insider-researcher and expert-resourcing. Presented rewards could be seen as advice and inspiration for novice GT researchers.

Introduction

Grounded theory (GT) is an inductive method, useful and suitable for qualitative data. It is highly appropriate for nursing research (Nathaniel & Andrews, 2007; Schreiber & Stern, 2001) and aims to discover a main concern of participants and how they manage and resolve such concern (Glaser, 1978). GT was formulated by Glaser & Strauss (1967) and elaborated by Glaser (1978, 1998), Strauss and Corbin (1998), and others. The method elaborated by Glaser is often called classic grounded theory (CGT). Researchers need to choose not only what method to use but also what approach (Heath & Cowley, 2004), remodeling (Glaser & Holton, 2004) or even synthesis of approaches (Chen & Boore, 2009).

The aim of postgraduate studies is to get a deeper understanding of both the subject and scientific methodology (Karolinska Institutet, 2007). A situation in which no expert is present to teach and guide in GT methodology is known as *minus mentoring* (Glaser, 1998, p. 5; Stern, 1994). Experience of such a situation is shared by many people over the world. One challenge with minus mentoring is that informed formative feedback, given

during the process in order to enhance learning (Biggs & Tang, 2007), may be lacking.

When my research education started, I did not know much about CGT. One of my supervisors had supervised an earlier thesis using a "grounded theory approach" (Baarnhielm, 2003, p. 47); the other two supervisors had no experience in using GT, though their attitude to the method was positive. In choosing the CGT method, my main concern was to perform good research while learning-by-doing.

The aim of this article is to share experiences of learning and using CGT. Memos as well as methodological discussions in my thesis and articles have been used as the basis for this discussion. The various categories, presented in the text below, are further illustrated with examples from my experience. The examples are taken from the my thesis (Pergert, 2008) and the four studies included there, referred to throughout this article by their Roman numerals I – IV.

Methodological Learning-by-Doing

This refers to the capability to acquire methodological skills and understanding while using the method and doing research. Consequences of learning grounded theory by doing include challenges and lessons learned but also rewards.

Challenges and lessons learned

In this section, some challenges and lessons learned, from my experience in using GT and learning-by-doing, will be presented, including sampling-confusion, delimiting-disregarding, judging saturation and conceptual language-struggling.

Sampling-confusion

The initial decisions for sampling in GT are based on the general subject area (Glaser & Strauss, 1967, p. 45). This is similar to purposive sampling in the sense that it aims to include people who are knowledgeable about the subject being studied (Polit & Hungler, 1999). In GT, this initial sampling should be followed by theoretical sampling of comparative groups and literature. "Theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyzes his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges.

This process of data collection is controlled by the emerging theory" (Glaser & Strauss, 1967, p. 45). Since theoretical sampling proceeds in tandem with CGT's joint processes of data collection and analysis, it could easily be confusing. A study that does not theoretically sample to sample other groups would still use the joint procedures for data collection and analysis; analyzing data between interviews to influence questions in subsequent interviews to further elaborate the emerging categories. Furthermore, the researcher needs to decide how large the sample should be from the initial group. If the study is a part of a dissertation project, the initial group might be sufficient for one study, so there would be no sampling from other groups. However, full use of theoretical sampling is important in developing the theory. For example, my third study (Pergert, Ekblad, Enskar, & Bjork, 2008b) is the one where I theoretically sampled beyond the initial group and it is by far the best GT study in the thesis.

Delimiting-disregarding

GT has delimiting tools for data collection. Some of these delimiting tools may be disregarded in studies, thus contributing to data-wallowing, which needs to be dealt with. In CGT, field notes are recommended in data collection rather than recording since the latter will undermine delimiting (Glaser, 1998). There could be several reasons for not following this recommendation. One is that recording is more acceptable to the scientific community, since field notes are often viewed as selective and biased (Glaser, 1998). Other reasons for recording interviews could be to have transcriptions for comparative analysis, quotations for illustrating various points as well as to enhance transparency in the supervision of the scientific work. However, this decision will contribute to data-wallowing, which can lead to premature closure of data collection and a lack of theoretical sampling, leading to a lack of conceptual depth.

Another methodological choice is the data collection method. In GT, common methods are interviews and observations. Focus group interviews, which I used in studies I & II (Pergert, Ekblad, Enskar, & Bjork, 2007, 2008a), may not be the preferred method for data collection in CGT, but it was argued that "the process of generating theory is independent of the kind of data used" (Glaser & Strauss, 1967, p. 18). Focus group interviews were found to be highly relevant for collecting data in the beginning of

a GT but not as good later in the process, since theoretical focusing and delimiting can be hard. One problem is the large amount of data from a few focus groups, which can delay the start of theoretical sampling and lead to premature closure of data collection, leading to a lack of conceptual depth.

As delimiting-disregarding will result in data-wallowing, it needs to be dealt with somehow, often by using different software programs for handling qualitative data. In the thesis, the software program QSR NVivo 2.0 was used as a tool (QSR International, 2002) to manage the data. Being relatively computer literate, I was soon engrossed in learning the software. However, becoming too enthusiastic, I started to use it for organizing code trees and creating models (Bazeley & Richards, 2000), which is not consistent with CGT. The main concern did emerge but the use of code trees and models may have preconceived an outline rather than letting the integration emerge in later sorting of memos (Glaser, 1998). In subsequent studies I used the software only as a coding tool, to deal with data-wallowing in a more GT congruent way. Even though the ambition was to use full GT procedures in every study of the thesis, different conceptual levels were reached in the analysis. This could be related to my GT learning curve and a lack of theoretical focusing and delimiting relating to delimiting-disregarding.

Judging saturation

There is no such thing as an ideal sample size in GT; instead, size is based on saturation (Glaser, 1998; Glaser & Strauss, 1967). That is, sample size is based on a judgment, in coding and analyzing, of theoretical saturation of categories, which implies that "no new properties emerge and the same properties continually emerge" (Glaser, 1978, p. 53) and that gaps in major categories are more or less filled (Glaser & Strauss, 1967). Saturation is always a subjective judgment and the decision to stop theoretical sampling, using the methodological guidelines, is always influenced by the scope of the research project, particularly in terms of time and resources. This judgment is a real challenge and the outcome could always be different; further theoretical sampling can usually be motivated. For example, in study I (Pergert, et al., 2007) it was decided not to theoretically sample for, and saturate, the subcategory of trust-building, since it could probably be a whole theory in itself. In

study IV (Pergert, Ekblad, Bjork, Enskar, & Andrews, n.d), theoretical sampling could have been carried out among Swedish-born parents but it was decided to use literature for comparative analysis, which is consistent with GT methodology (Glaser, 1998). Furthermore, only one father was included in the individual interviews with foreign-born parents. This did not emerge as relevant but could be seen as a limitation, as support-seeking, one of the subcategories, is used more frequently among women (Norberg, Lindblad, & Boman, 2006). Theoretical sampling was delimited by a judgment about the scope of the dissertation project; other comparative groups could always be sampled. In all of the studies, further theoretical sampling, bringing in new relevant data from new fields, would undoubtedly lead back to theoretical non-saturation (Glaser, 1978) and modification, but then again, a GT is always modifiable.

Conceptual language-struggling

Conceptualization is central in GT. The name of the core category should have "grab" (capture attention) and often takes the form of a gerund (ending in *-ing*) to bring out its nature of explaining a behavior; managing and resolving the main concern (Glaser, 1978, 1998). Naming a category with grab in a language that is not one's mother tongue is a challenge, as nuances and subtle meanings are easily missed. Often categories need to be named in two languages and sometimes translation can be a problem. For example, I named categories in the analysis in both English and Swedish, the latter being my native tongue. However, the use of gerund verbs is characteristic of GT but the Swedish language lacks the gerund verb form, so the core is often named as an infinitive, for instance "to bridge" instead of "bridging". In the search for the best possible names of categories, I discussed my choices with English text editors; this was a great help but these text editors were not acquainted with the method and seldom enthusiastic about new conceptual gerund names.

Rewards

Rewards from using and learning GT will be presented below. These rewards, which could be seen as advice and inspiration for novice GT researchers, include: trusting the method, insider-researching and expert-resourcing.

Trusting the method

In CGT, emergence of theory is central (Glaser, 1998). The concept of emergence may sound unscientific and strange but it is simply a matter of trusting that what is going on in the empirical field will emerge from the data (Glaser, 1998). The aim of CGT is to let the participants' main concern emerge, instead of focusing on what Glaser (1998) calls "professional concern" (p. 99) or a "professionally preconceived problem" (p. 118). The inductive emergence will guarantee a good fit; that is, the theory will adequately express what is happening in the empirical situation, and be highly relevant. For example, when I began my first study (Pergert, et al., 2007) my preconceived notion was that the study would be concerned with medical information; this was also healthcare staff's spontaneous answer to what was the biggest challenge in transcultural care. As data were analyzed, using GT, what emerged instead as the core was bridging obstacles to transcultural caring relationships. Bridging is what Glaser (1998, p. 5) calls the 'latent pattern' of behavior, of which participants are not necessarily aware. The preconceived notion of giving medical information was something that healthcare staff was aware of, whereas obstacles to transcultural caring relationships were actually a major concern. This major concern would probably not have been identified with a method that focuses more on predefined problems, testing hypotheses, and using preset and narrower questions. For example, Strauss and Corbin (1998) proposed that professional experience and suggestions could be used to identify the research problem. Experiencing emergence is a most rewarding moment; after working in complete confusion with masses of data; you finally discern the pattern or the core. It is a great advantage to use and trust a well-tried methodology, especially when doubting one's own capacity.

Insider-researching

Glaser (1998) holds that research is easier to do where you know nothing about the substantive area under study; on the other hand, doing research in a familiar area leads to motivation and more variables to deal with. Insider research is common in the qualitative field in the context of nursing (Asselin, 2003; Cudmore & Sondermeyer, 2007) and could be seen as an advantage, as the double role may enhance trust in the interviewer (Glaser & Strauss, 1967); positively influence the

relationship (Asselin, 2003) and consequently also the data. This was, for me, a rewarding experience in working as an "insider researcher". Further, my motivation and drive as an insider were far more important than doing easy research.

Expert-resourcing

Gathering resources to compensate for minus mentoring includes information-seeking by using the literature on CGT and feedback-seeking while learning by using available resources such as research groups, experienced grounded theorists and reviewer feedback on manuscripts - not always fun to get but sometimes very helpful indeed. When I had written my first manuscript, I heard of a GT troubleshooting seminar arranged by the Grounded Theory Institute (2005a) in Stockholm. To prepare for the seminar, I read three books on GT (Glaser, 1978, 1998; Glaser & Strauss, 1967) and realized that I had been on the wrong track. Following the seminar, I reworked the manuscript, now with a new core category and an attempt to write more conceptually. Since then, I have had the opportunity to participate in several international GT seminars (Grounded Theory Institute, 2005b, 2006, 2007) given by GT experts, providing great assistance in naming core categories, taking the analysis several steps further and contributing immensely to the GT learning process.

Discussion

In this article, challenges and lessons learned as well as rewards in learning GT by doing have been presented. Expert-resourcing and feedback-seeking are recommended in this article, in accordance with educational and methodological literature that states that feedback is necessary to enhance learning (Biggs & Tang, 2007; Glaser, 1998). Feedback-seeking could include feedback from reviewers of manuscripts, using errors for learning (Biggs & Tang, 2007). However, it is crucial to consider how the feedback is given and received, especially if there is a discrepancy in the understanding of GT as held by the reviewer and the author. This is often the case when CGT is confused with other approaches referred to as GT.

In regard to learning-by-doing, one could argue that research education should be organized differently, with much more methodological study before starting the research project. Equally, it could be argued that the only way to learn a method is

by using it and in doing so, develop one's skill. Learning-by-doing is similar, or rather has an ingredient of just-in-time learning, which is about learning something when one needs to (Biggs & Tang, 2007), thus giving motivation and relevancy. Methodological studies that are not needed for the task at hand are often perceived as boring and irrelevant. In the words of Glaser, "Just do it" (1998, p. 254) and "Trust Grounded theory, it works!" (1998, p. 254).

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