



Helping scholars advance their research agenda

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Abstract

We developed a qualitative research workshop to help full-time and part-time faculty develop or recharge their skills and advance their research agenda. Though originally designed for faculty, the workshop attracted graduate students and administrators (many who serve in dual roles). The workshop is condensed, comprising several hours of individual preparation and ten hours of group activities, and it covers the following learning objectives: position your research question within a research paradigm, identify and manage ethical issues, select a qualitative model for your research, plan data collection techniques, collect and code your data, and identify strategies for success. Though intended to be inspirational and motivational, this goal is also realistic and relevant, and has proven to boost qualitative research activity. Based on currently available evidence, the workshop is effective in helping faculty, administrators, and graduate students advance their research agenda. We anticipate this conclusion will be sustained as systematic evaluation data becomes available.

Keywords: Research agenda; Workshop; Learning objectives



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Introduction

Typically, accounting professors start their research trajectory as graduate students. They identify a research interest while pursuing an advanced degree, may publish excerpts from their thesis or dissertation as a book or journal article, then continue this strain of research during their early faculty years.

Many professors, however, arrive at the research portal via other routes. They practice in the commercial, government or nonprofit sectors for years before becoming a full-time professor, allowing their research skills to fade. Upon joining the academy, they may experience the desire or requirement to conduct research but lack the benefit of continuous research momentum from graduate school. Others may become full-time professors immediately after graduate school but allow their research skills to atrophy due to personal or institutional factors such as lack of interest, burdensome teaching loads, or a promotion culture that is lenient regarding research. When personal priorities or instructional expectations change, they suddenly have the desire and moreover the requirement to conduct research, but not the requisite skills. A third group, part-time faculty, are not required to conduct research, yet may choose to do so to enrich their teaching and skill development or to strengthen relationships with full-time faculty. The American Accounting Association (AAA) and American Institute of Certified Public Accountants (AICPA) encourage institutions to include part-time, practicing accountants in research activity (The Pathways Commission 2014).

We developed a qualitative research workshop to help full-time and part-time faculty develop or recharge their skills and advance their research agenda. The workshop was conducted on four occasions with participants from multiple countries in Latin America, primarily Bolivia and Colombia. Though originally designed for faculty, the workshop attracted graduate students and administrators (many who serve in dual roles), so we have experience with diverse participants. Initially, the workshop was conducted on campus, face-to-face. During the COVID pandemic it was conducted online using the Zoom platform and continues to be offered online. The workshop is condensed, comprising several hours of individual preparation and ten hours of group activity, yet has proven effective in boosting qualitative research activity.

The remainder of this paper describes the learning objectives, learning materials, and implementation activities. The last two sections present outcomes and conclusions.



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Theoretical Framework

The workshop is based on qualitative research methods because qualitative research is accessible to a broad array of scholars, including those who lack sophisticated statistical skills. It is designed to boost near-term research activity as well as provide skills for long-term scholarly success.

The overall goal is to, “Make the world better through qualitative research.” Though intended to be inspirational and motivational, this goal is also realistic and relevant. Much qualitative research tackles salient issues that impact identifiable communities, whether geographic or communities of interest. As a leading institution in a developing country, the host university encourages faculty to conduct research of “social relevance with the analysis of the context”. A starting point for qualitative research is that it should “add to the literature or to policy or to practice” (Creswell 2016, 19). The overall goal of the workshop is supported through these specific learning objectives:

Table 1: Learning Objectives	
1	Position your research question within a research paradigm
2	Identify and manage ethical issues
3	Select a qualitative model for your research
4	Plan data collection techniques
5	Collect and code your data
6	Identify strategies for success

For a complete explanation of each specific learning objective presented in the above table, please refer to Appendix A.

Methodology

We have implemented this workshop in live, campus-based settings and online via Zoom. Both formats feature the same learning objectives and learning materials, and both require participants to study workshop materials in advance of the group sessions. In the campus-based format, students have the option to meet personally with the instructors to ask questions prior to group activity, whereas the online format employs a message board for questions prior to synchronous, group activity. In general, the alternate formats offer a similar learning experience. Students study workshop materials, then meet (in person or via Zoom) to discuss the materials and apply them to plans for their own research proposals. The learning activities, described below, can be implemented in either format.



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The goal of the workshop is to help individuals refresh or reboot their research agenda, not to replace an extended, graduate-level research course. (The workshop does attract graduate students, however). Designed for faculty and administrators, the schedule is condensed. In both formats, individual study of the workshop materials is followed with five, 2-hour group sessions (10 contact hours). In the campus-based format, the group sessions occur over five consecutive days. In the online format, the group sessions are spread over four to five weeks.

The first four group sessions feature discussion and application of learning materials. During the fifth session, participants present their research proposals and receive feedback from the instructors and other participants. After the group sessions, participants finalize their research proposals and submit them to the instructors for individual feedback. The schedule may be modified. For example, a campus-based workshop could be spread over more days, perhaps meeting once or twice a week for several five weeks, or the workshop could feature a blend of on-campus and online group sessions. Sessions 4 and 5 could be combined into a single session to accommodate the demanding schedules of working professionals. The essential elements are the study materials and the practical applications leading to an individual or team research proposals.

Individual study before the first group session

Participants receive the study manual as a PDF at least two weeks before the first group session and are asked to note any questions from their individual study of the manual. The manual contains extensive citations, allowing participants to study various topics in more depth. We also ask participants to identify two or three academic articles that interest and inspire them and that reflect the type of research they hope to conduct, and to bring copies to the first group session.

Session 1: Position your research question within a research paradigm and identify ethical issues.

To start the first group session, we review the outline for the research proposal to be submitted at the end of the workshop, Appendix A. This gives participants a target to aim for and a template for organizing their work as the workshop progresses. Discussion is dedicated to the first two learning objectives and to formation of draft research questions. Instructors lead a discussion of the Burrell and Morgan (1979) sociological research model, then in small groups, students analyze and discuss their chosen research articles in relation to this model with the following prompts:

- Do your chosen articles reflect a positivist or constructivist perspective?
- In relation to Burrell and Morgan (1979), what paradigms underlay your chosen articles (interpretive, radical humanist, functionalist, or radical structuralist)?



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- Do the authors reveal these paradigms explicitly or implicitly?
- How might researchers use different paradigms to investigate the same research topic?
- What theories or conceptual frameworks are referenced in your chosen articles? (Of course, not every article will reference a specific theory or conceptual frameworks, but this encourages participants to consider the role of models and frameworks in guiding research).

Later in the session we summarize the Belmont report, ethical guidelines for working with human subjects, the role of IRBs, and steps that can help ensure ethical research in the absence of a formal IRB process (described above). In small groups, participants apply these principles to their own projects by responding to these prompts and discussing with the group:

- What is your draft, proposed research question? (Many participants enter the workshop with an idea of what they wish to investigate. If not, we encourage them to craft a research question as an anchor for workshop activities. Research questions are revised and refined during the workshop.)
- Why is this research question important? Who will care about the results of your research? Is this research question part of addressing a broader social or economic issue?
- What research paradigm (Burrell and Morgan 1979) most closely aligns with your planned research?
- Are there existing models or conceptual frameworks that might guide your research? (Participants may have identified models and frameworks during their individual article search or through group discussions).
- Will your research involve human subjects? If so, what ethical concerns does this raise (e.g., privacy, anonymity, reciprocity, justice)?

By the close of the first session participants have identified a draft research question, associated it with a research paradigm, considered possible models or frameworks to inform their research, and made an initial identification of potential ethical issues.

Session 2: Select a qualitative model for your research.

The second session is dedicated to exploring five qualitative research models (Creswell 2011). We briefly review each model, then participants deepen their understanding through small-group exercises. Exercises 1 and 2 were designed especially for participants in South America; alternate, parallel exercises can be developed for



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participants from other cultures and geographic locations. These exercises encourage participants to appreciate the value of different research models; this aligns with the workshop goal of promoting long-term development as a researcher and promoting skills for assessing the research of others. In contrast, Exercise 3 encourages participants to focus on their most immediate research objective, with input from other group members.

Exercise 1: As of October 2021, the COVID-19 vaccination rate in Bolivia is below the global average and leaders wish to increase the vaccination rate. Create 3 concise, focused research questions to help address different aspects of the problem, then select an appropriate research model for each question. Strive for a diversity of research questions and associated models.

Exercise 2: The Organization of American States (OAS) and the nation of Bolivia have partnered to promote digital commerce for micro, small, and medium-sized enterprises (MSMEs). The goal is to help thousands of small businesses participate in the digital economy. You have been hired to assess the impact of this program. It is a broad program that can be assessed from multiple perspectives. Create three concise, targeted research questions to assess the success of this program, then select an appropriate research model for each question. Again, strive for a diversity of research questions and associated models.

Exercise 3: Have each participant, in turn, state his or her draft research question but not reveal their current choice of a research model. Others in the group provide feedback using the following prompts:

- As the research question is currently stated, is it sufficiently focused to anchor a single project, or might it be separated into two or more distinct studies? (Researchers are often tempted to tackle too much in a single study).
- As the research question is currently stated, what model seems most appropriate for this project? (If more than one model seems appropriate to a single question, it may imply a mixed methods study or may indicate that the research question is too broad and needs to be refined.)
- Playing “devil’s advocate,” can you identify an argument for using a different model?
- Finally, individual participants reveal their thoughts about an appropriate research model.

By the close of the second session, participants have deepened their understanding of qualitative research models, refined their research question, considered the suitability of different research models, and tentatively selected a model to guide their research.



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Session 3: Plan data collection techniques and collect and code your data.

During this session, participants create details of their research proposal by identifying what data they plan to collect and how collection will occur. After a brief review of various data collection techniques, we divide participants into small groups. Participants develop plans for their individual or team project by writing responses to the following prompts:

- What data do you plan to collect?
- How, where, and when do you plan to collect it (e.g., collection technique, schedule, locations)?
- Will you have to seek permission to collect data? From whom?
- How will you address ethical issues (e.g., privacy, anonymity, reciprocity, justice)?
- Will you combine qualitative and quantitative data? (Demographic data are often used to add context to a qualitative study).
- Have you identified conceptual frameworks, rubrics, interview protocols, or surveys from prior research that can be adapted for your study?
- How can you enhance the validity, reliability, and transferability of your results through use of outside experts, triangulation, or other means?

Participants present their data collection plans to other group members for comment. To end the session, we review the content analysis process, coding systems, and options for content-analysis software.

Session 4: Identify strategies for success.

During the fourth session, we review strategies for presenting and publishing research results. It is also an opportunity for final questions as participants prepare their individual or team research proposals. We review the research proposal outline, Appendix B, so expectations for the final group session are clear. In small groups, participants discuss the following prompts:

- If your research involves human subjects, how will you obtain ethics approval for the project? (This involves completion of human subjects training and submission of a formal IRB request or alternate form of approval, such as from an academic dean.)
- Do you plan to recruit research partners? What are the potential advantages and disadvantages of recruiting research partners?
- Identify 2-3 conferences where you could present your research and receive suggestions from peers.



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- Identify 3 journals, newsletters, or other publication venues where you could publish your research report. Strive to identify both academic and practitioner publication venues.

By the close of the fourth session, participants have considered the recruitment of research partners and have begun to identify venues for presentation and eventual publication of their research.

Session 5: Presentation of research proposals.

The final session is an opportunity for participants to present their individual or team research proposal and to receive feedback from their peers and instructors. Instructors and other participants provide verbal comments to participants during the session. During the presentations, we use a checklist, Appendix C, to record comments.

Participants who are taking the workshop for academic credit are required to submit a final, refined research proposal (Appendix B) to the instructors within one week of the final group session. The instructors provide feedback on this final submission.

Results

We conducted this workshop four times from 2017 to 2021 and will offer it again in fall 2022. The first two iterations were conducted on the Cochabamba and La Paz campuses of the Universidad Privada Boliviana, and two subsequent iterations were offered online via Zoom. In total, there have been 109 participants. In the first three workshops, all participants were from the country of Bolivia. The fourth workshop was opened to other countries and included participants from Bolivia, Colombia, Ecuador, Spain, Mexico, Perú, and the Dominican Republic.

The workshop was initiated to help faculty and administrators advance their research agenda, and at least 36 faculty and administrators have participated in the workshop. The workshops also attracted 16 UPB alumni and 57 current students from various universities (some of whom were also administrators or faculty). The students were primarily from MBA programs or doctoral programs in business, economics, and engineering. About 63 percent of the total participants were male.

The goal is to spark research activity that will be sustain over several years, so we are interested in all subsequent research and scholarly activity, not simply whether participants completed the proposal developed during the workshop. Collection and analysis of this



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follow-on data is ongoing. Anecdotally, several faculty and administrators who attended have boosted their research activity and presented and/or published their scholarship subsequent to the workshop. A faculty-administrator who attended the first workshop has published several articles and serves as coordinator for Sustainability and CSR research for the Latin America and Caribbean Chapter of the Academy of International Business. Another faculty-administrator has published two articles since the workshop, has working papers in progress, and co-chaired the annual conference of the Latin America Caribbean Chapter of AIB. Several graduate students used the workshop to initiate proposals for their masters' theses or doctoral dissertations, which have subsequently been accepted. Graduate student participants have also presented their research at Latin American research conferences. Finally, 16 participants from early workshops have returned to repeat the workshop, which we interpret as positive, personal endorsements.

Discussion and conclusions

Based on currently available evidence, the workshop is effective in helping faculty, administrators, and graduate students advance their research agenda. We anticipate this conclusion will be sustained as systematic evaluation data becomes available. The condensed format (individual study followed by ten hours of group sessions) makes it accessible to busy faculty and administrators as well as graduate students.

The COVID-19 pandemic forced the workshop format to change from on-campus to online. In either format, participants study the core materials and complete the application exercises. Since the online format opens participation to individuals from multiple locations and promotes an ancillary goal of developing research networks across countries, this format will be continued.

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Appendix A: Explanation on each specific learning objective

Position your research question within a research paradigm.

This first objective concerns the nature of “truth” and how attitudes toward “truth” are reflected in various research paradigms. This material helps participants appreciate the contributions of different approaches to research, qualitative and quantitative, and to understand where their research activity will fit within the realm of research. They explore the assumptions behind qualitative and quantitative research and the contributions that qualitative research can make to problem solving, as well as the limitations. As qualitative researchers, one of our tenets is that no research is “value free.”

What is “truth”? Plato saw truth as objective and unchanging: “The philosopher is in love with truth, that is, not with the changing world of sensation, which is the object of opinion, but with the unchanging reality which is the object of knowledge.”³ In contrast, The American philosopher John Dewey said, “Reality is what we choose not to question at the moment.”⁴ Given that qualitative research is relevant for particular people, places, and times, it is weighted toward Dewey’s end of the objective-subjective spectrum. Workshop participants review concepts such as validity, reliability, and transferability. High-quality, quantitative research strives for validity and reliability. In contrast, high-quality, qualitative research approaches these values but aims for the standard of transferability.

To help participants position their research within research activity, the workshop materials help them contrast positivism vs. constructivism, concepts that align with objective vs. subjective reality. Positivists believe there is an objective truth “out there”; the researcher’s job is to discover that truth and use it to benefit humankind. Constructivists believe that truth is socially constructed, subjective, and subject to change; the researcher’s job is to discover why particular notions of truth arise, and perhaps how to alter those perceptions. The workshop helps participants appreciate that both perspectives have value yet encourages them to identify which perspective is most likely to provide coherent, sustained motivation for their own scholarship.

The materials include a synopsis of the sociological research paradigm developed by Burrell and Morgan’s (1979). This framework was introduced as a guide to research in sociology but has been applied in many fields. The framework is based on two dimensions that correspond to two questions. The first question is, “What is the nature of reality?” This corresponds to the subjective – objective dimension that students have just studied. The second question is, “What is the purpose of your research?” This question corresponds to a dimension defined as “status quo” vs. “promote change.” The framework presents four distinct, research paradigms. The “Interpretive” and “Radical Humanist” paradigms are

³ Plato, *The Republic*, Penguin books.

⁴ See Reality and the Criterion for the Truth of Ideas, *Mind*, 1907. Also, Becker(1993, 219) on dealing with validity and reliability...



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found on the subjective side of the framework, and the “Functionalist” and “Radical Structuralist” paradigms complete the objective side of the framework.

Knowledge of these paradigms will help participants advance in their research journey. When participants identify to which paradigm they are drawn, it helps them identify which journals they should read, to which conferences they should submit their working papers, and where they can find similarly-motivated scholars to assist in their endeavors. Eventually, individuals who embark on a research journey will discover which sub-communities and journals are critical for their own work. We include the Burrell and Morgan (1979) framework in the workshop to help participants advance to that discovery sooner rather than later.

Identify and manage ethical issues

During qualitative research, the investigator often interacts with other individuals. This creates the potential for misinformation, manipulation, and other harms. Morally (and ethically), it is imperative that participants understand their responsibilities as researchers and take all necessary precaution to avoid harming others. These steps must be taken at the start of their research, or they may be unable to present or publish their findings. Journal editors and conference organizers often require proof that the research protocols were approved by the authors’ Institutional Review Board (IRB) or a similar ethics review body before data collection was commenced.⁵

Participants learn of the abuses that led to creation of the National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research and the resulting report, the Belmont Report (1979). To prevent ethical abuses, the Belmont Report establishes 3 broad responsibilities for researchers: respect for persons, beneficence, and justice. Participants study practical steps that will help them uphold the findings of the Belmont report, such as safeguarding the personal information of individuals who participate in a study and obtaining informed consent in written, verifiable form. The study materials, as well as group discussions, address the role of IRBs (Internal Review Boards) and steps that may be take where there is no formal IRB. When the institution lacks a formal IRB, we advise workshop participants to seek approval from any office that exercises an ethical oversight or from deans or other high-level administrators. For added assurance, we advise them to complete formal training on the ethics of working with human subjects.⁶

⁵ Similar requirements exist for research involving other animals or living organisms. For instance, research involving vertebrate animals should be reviewed and approved by an Institutional Animal Care and Use Committee (IACUC).

⁶ Typically, institutions with a formal IRB will also provide ethics training on working with human subjects (or other living organisms). This training may be made available to researchers from other institutions. For



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Select a qualitative model for your research

This segment of the workshop is founded on the five models of qualitative research developed by Creswell (2011, 2013, 2015, 2016, 2019). Other literature that informs this segment includes Merriam and Tisdell (2016), McDonald (2012), Hancock and Algozzine (2011), Bringle *et al* (2009), Patterson and Williams 2002, and Smith (2014, 2020). The Smith literature (2014, 2019) is of special value to accounting scholars because it focuses on accounting research methods and examples of successful accounting research. During the workshop, participants study these qualitative models: narrative, case study, phenomenology, ethnography, and grounded research. They also study action research as “a case study with an agenda,” and the benefits of mixed methods research.

Each model asks a different question (Smith 2014, 2019; Creswell 2011).⁷ For example, narrative research asks, “What happened to this person(s) and what can we learn from his or her experience?”, while phenomenology asks, “What is the same about their experiences, and what does it mean?” In a case study, the researcher asks, “What may be learned from this case? Though Creswell identifies case study as a distinct, qualitative research model, this label is ambiguous. A case study is sometimes considered a choice of “what to study” rather than a separate model. Since the workshop emphasizes the value of localized, qualitative research, we include action research: “a case study with an agenda.” Action research focuses on a particular situation or case, and asks, “How can I change this? How can I make this happen? How can I improve this situation?” Participatory action research is used in diverse fields such as manufacturing, agriculture, education, social work, and health care.

Workshop participants also study the model known as grounded research. This model is appropriate when the phenomenon or issue of concern cannot be adequately explained by existing theory. In grounded research, the researcher asks, “What new theory could explain this phenomenon?” Grounded research is inductive; the investigator gathers data to build concepts, hypotheses, or theories from the ground up. This contrasts with other models, where a theory or conceptual framework guides data collection (Creswell 2013, 86). Most grounded research is practical, seeking to address specific problems or issues. Data mining in accounting or marketing studies is an example of grounded research; investigators analyze large amounts of data to determine what patterns will emerge. Otherwise, it may be difficult

example, a researcher from Bolivia completed online, human subjects training provided by a U.S. institution because similar training was not available on her campus.

⁷ The distinctive research questions associated with each model are drawn from Smith and Creswell.



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to identify genuine, grounded research studies, for most research is guided by expectations of what to look for and what will be found.

Workshop materials also address the value of conceptual frameworks in qualitative research. A conceptual framework can be viewed as a “mini theory.” It is a model or pattern of relationships among items of interest. It may be hierarchical and is often illustrated with a diagram. A suitable framework guides investigators in data collection and interpretation. Indeed, a suitable framework can be part of the justification for a study, perhaps to test the framework or apply it to new situations. Conceptual frameworks are especially useful in qualitative and interpretative research. They help investigators think in a logical, systematic manner. They also guide sensemaking and understanding, and researchers advance from description to analysis. There are endless examples of frameworks. In the workshop we review examples such as the sociological research paradigm discussed above (Burrell and Morgan 1979), the organizational legitimacy framework, and Fink’s significant learning taxonomy (2003, 2012). If no suitable framework exists, researchers can contribute to a field by developing and testing a new framework.

Plan data collection techniques

Qualitative research employs a wide array of data collection techniques. This portion of the workshop is informed by Hancock and Algozzine (2011), Merriam and Tisdell (2016), Bringle et al (2009), Smith (2014), Patterson and Williams (2002), Giddings & Grant (2009), and Creswell (2016). Participants review various sources of data and the challenges associated with each. We also review the necessity of triangulation: collecting data from diverse sources to enhance validity.

Documents and artifacts are a good starting point for data collection and can be viewed as an extension of the literature review. Documents and artifacts provide insights into a person or a group’s beliefs, attitudes, and behaviors, as well as the general social milieu (Hancock and Algozzine 2011, 51). Materials created by the researcher or subjects, such as transcripts and diagrams, are included in this category. Validating the authenticity of documents and artifacts is always a concern, and this challenge is increased in the case of computer files. Participants also study the use of observations and surveys. In participant-observer research, the investigator interacts with the subjects; this occurs during action research. We note a potential challenge in the use of observations: negotiating access to the observation setting, including the permission of participants (Hancock & Algozzine 2011).

Surveys, a quantitative technique, are sometimes described as “quantitative data in the service of qualitative data.” In fact, qualitative and quantitative data serve each other; this is the value behind mixed-methods research. During the workshop, participants review the use of Likert-type scales and ranked-choice scales. If researchers find surveys that meet



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their needs and have already been published in academic literature, it lends validity to their own project (Bringle *et al* 2009). Attaining sufficient response rates is a perennial challenge in using surveys. Moreover, some journals (or journal editors) may not esteem survey research. Using survey data to triangulate with other data helps alleviate this concern.

Other data collection techniques are interviews and focus groups. Workshop participants review techniques for structured, semi-structured, and unstructured interviews. This includes techniques for gaining the trust of interview subjects, such as assuring subjects that they may review transcripts for accuracy and approve the transcript before interview data is included in published results. Focus groups have been described as interviews conducted in a group format (Bringle *et al* 2009, 31), but that may be misleading. Different information will emerge from the two formats. In reviewing the use of interviews and focus groups, workshop participants are reminded of the safeguards required by research ethics and often specified by IRB's, such as safeguarding anonymity and explaining how results will be shared with interviewees.

This segment includes a review of ways to enhance the quality of data, stressing key concepts such as validity, reliability, and transferability. Transferability is a “usefulness” standard. Since qualitative research is contextual, anchored in place and time, qualitative researchers do not profess to have found objective truth. Rather, the goal is to discover insights, patterns, and principles that can be applied elsewhere. Workshop materials also address pitfalls such as faulty constructs, “self-selection” bias, “social desirability” bias, and “errors of omission.” Participants learn to enhance the validity of their data through various forms of triangulation.

Patton (2015, 703) describes the rigorous thinking required for successful research: “Methods do not ensure rigor. A research design does not ensure rigor. Analytical techniques and procedures do not ensure rigor. Rigor resides in, depends on, and is manifest in rigorous thinking — about everything, including methods and analysis.”⁸ Throughout the workshop, we encourage participants to develop rigorous habits to increase the probability of useful, transferable findings.

Collect and code your data

In this portion of the workshop, participants consider the practical steps and concerns related to collection and analysis of qualitative data. This includes capturing background

⁸ Michael Patton 2015, 703. *Qualitative Research & Evaluation Methods: Integrating Theory and Practice*. Sage.



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details such as when, where, how, and by whom data were collected. This information as well as the data content should be retained for several years; the pertinent IRB or ethics body may have standards on retention of data. Workshop participants review use published protocols and rubrics to guide analysis. This has the advantage of “pre-validating” the collection and coding methods. Researchers should examine potential rubrics and analytical schemes from journals where you hope to publish.

Most qualitative research involves some form of content analysis. Content analysis is applied to multiple types of data such as documents, news articles, marketing reports, advertisements, annual reports, transcripts from interviews and focus groups, and photographs and illustrations. We address both form-oriented and meaning-oriented analysis. To enhance validity, two or more researchers should independently code the same data, then compare and reconcile results. We recommend a triad of coders (triangulation, again) to establish validity. Smith (2020, 147-148) sites 80% initial, inter-coder agreement as a standard for reasonable validity.

The time required for content analysis, and for conducting validity checks with co-investigators, explains why qualitative research is often considered more time-consuming than quantitative research. The process may be rendered more efficient through use of qualitative data analysis (QDA) software. Ultimately, whether researchers use a more structured or less structured approach, and whether they use QDA software or completely manual approach to data classification and coding, they should be prepared to adjust the research plan. Qualitative research involves “emergent” design and rarely proceeds exactly to plan (Creswell 2013; Smith 2020). Based on initial coding and analysis, researchers may even revise the research question.

Identify strategies for success

“You have to learn the rules of the game, and then you have to play better than anyone else.”

This quote is attributed to Albert Einstein (1979-1955). If one of the finest minds of the 20th Century could not escape the gamesmanship in human affairs, normal humans cannot hope to do better. This final segment provides insights to help scholars succeed in the research and publication process, including some content that is best described as “insider tips” or “lessons learned the hard way.” We review the type of information one might gain by talking with peers during coffee breaks at academic conferences, or by having an effective faculty mentor. Nontraditional faculty and those whose research activity has waned may lack these beneficial experiences.

In the workshop materials, we revisit the literature review. The review informs the choice of a research model and provides clues on where to gather data and what to look for. It may reveal relevant surveys or rubrics that have been used by prior investigators and peer-reviewed, thus “pre-validated” for the current research. It helps new researchers identify the



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linguistics of the field and helps to identify suitable journals for the current research. The literature review may even suggest potential research partners (Hancock and Algozzine 2011). As researchers collect and code data, preliminary results may prompt them to explore new theories or frameworks, which means expanding and refocusing the literature review.

Through the materials and group meetings, we address other topics such as the relative advantages of publishing in academic vs. practitioner journals and journal articles vs. book chapters, and the costs and benefits of attending conferences. The workshop includes practical tips on organizing the research report and working with editors and reviewers.

The manual we developed for the workshop contains 268-pages of user-friendly material; each page presents graphic material plus typed content. The manual contains numerous direct quotations with citations, so participants can pursue further study on a particular topic. Original sources for the content are listed in the references section of this paper. The manual is not yet available commercially but is available to anyone who enrolls in the workshop offered through Universidad Privada Boliviana. To date, participants from UPB or other institutions have been allowed to enroll at no cost, though graduate students who wish to earn college credit for the workshop pay a tuition fee.

Appendix B: Create a Research Proposal

Organize your proposal by the following topics. Number each topic as shown below. Please submit your proposal in English.

1. What is your research question?
2. Why is this research question important? Who will care about the results of this research?
3. Will your research methodology be primarily guided by positivism or constructivism?
4. What research model will guide this project?
5. Will your research involve interaction with human subjects? If so, how will you obtain informed consent from them? How will you demonstrate respect for the autonomy of the subjects? How will you safeguard anonymity of subjects, and demonstrate reciprocity?
6. What types of data will you collect? Please be specific.
7. How will you enhance the validity and transferability of the data and your results?
8. Where can you present the results of this research? (Identify meetings, conferences, newsletters, journals, or other venues).
9. Do you expect to conduct this research alone or with a partner? If you expect to have a partner, explain the benefit of having a partner.



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Appendix C: Feedback Checklist – Qualitative Research Proposal

Name of participant:

Name of research project:

1. What is the research question?
2. Is the research question clear and compelling (important)?
3. Is the primary paradigm identified? (constructivist or positivist)
4. What is the research model, and is it appropriate?
5. Are there ethical issues related to human subjects? Is there a plan to deal with ethical issues? (Informed consent, respect for the autonomy of the subjects, safeguard anonymity of subjects, demonstrate reciprocity.)
6. What are the specific data collection techniques?
7. How will the validity and transferability of the results be improved? (multiple types of data, multiple data sources, asking others to review results)
8. Is there a plan for presentation of results? (Meetings, conferences, newsletters, journals, etc.)
9. Will this project involve research partners? If so, what is the benefit of having a research partner?