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# When Novice Researchers Adopt Constructivist Grounded Theory: Navigating Less Travelled Paradigmatic and Methodological Paths in PhD Dissertation Work

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## Abstract

Graduate students considering constructivist grounded theory as a qualitative methodological approach may benefit from recognizing the many challenges they could face when embarking in thesis work. These challenges include great diversity in approaches to grounded theory, lack of congruity in how grounded theory methodology is described and understood within the literature, and a dearth of expertise and/or support within academic committees and institutions for both grounded theory and constructivist approaches to qualitative research. In this article, we describe why we selected constructivist grounded theory for our PhD work and the common challenges we encountered. Drawing on the analogy of preparing for a journey, we offer strategies for future graduate students including locating one's ontological and epistemological worldview, finding grounded theory mentors, and facilitating a methodological fit with academic stakeholders. Our recommendations focus on how to navigate the challenging terrain of conducting a qualitative research project within a predominantly post-positivist landscape.

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**Keywords:** qualitative research, constructivist grounded theory, graduate students, methodology, grounded theory

*"I shall be telling this with a sigh  
 Somewhere ages and ages hence:  
 Two roads diverged in a wood, and I —  
 I took the one less traveled by,  
 And that has made all the difference."*

Robert Frost (1916)

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## Introduction

Determining a research focus, defining a research question, selecting an appropriate methodological approach to address the question, and, finally, implementing the research project in PhD dissertation work are exciting and daunting parts of the academic journey. While much of this scholarly road has been well-travelled by doctoral students before us, our path diverged to one less traveled—akin to Frost’s poem—when we selected a constructivist grounded theory (ConGT) approach over more common forms of qualitative research, including established grounded theory (GT) methodologies. Selecting GT as a qualitative research approach has been equated to navigating terrain (Hunter, Murphy, Grealish, Casey, & Keady, 2011) and as being a “long walk through a dark forest” (Wu & Beaunae, 2014, p. 249). In choosing ConGT, we similarly found ourselves weaving through a myriad of paths in a landscape of varied and divergent perspectives of ontological and epistemological philosophies on GT, requiring navigational skills we would not have anticipated at the outset of our dissertation work.

In reflecting on our respective dissertation journeys, from early proposal development through to the latter stages of our research processes, each of us realized that we had encountered challenges in having adopted ConGT. Fundamental and historic tensions between positivism/post-positivism and constructivism as described by Guba and Lincoln (1994) seemed to overarch many of these challenges, playing out amongst the various GT traditions and within our respective learning environments. We encountered differences of opinion with PhD mentors and other GT researchers, either because of differing paradigmatic inclinations or lack of agreement amongst established GT methods and procedures. Further, we often had difficulty distinguishing clearly articulated examples of ConGT and other GT research in the literature as methodological approaches rather than merely analytical frameworks in qualitative data analysis (QDA).

In reviewing literature to determine whether our experiences were unique, we found little written on PhD students in the dissertation process and even less information on graduate students utilizing GT, specifically ConGT. Thus, our purpose in this article is to illuminate some of the divergent paths and hurdles we faced navigating the use of ConGT and to highlight key learning experiences from our research processes. We begin with an overview of our backgrounds and rationale for having selected ConGT as our methodological approach, and present some of the barriers, challenges, and facilitating factors encountered along the path “less traveled by.” We contrast and contextualize our experiences with our understanding of constructivism, GT and ConGT from the literature and offer thoughts and strategies for consideration by future graduate students contemplating use of ConGT in dissertation work. Our perspectives may also inform the broader academic community, such as supervisors and committee members, who strive to support graduate students using ConGT in dissertation work.

## Orientating Ourselves: A Compass Heading Towards ConGT

A major consideration at the beginning of our respective research processes was selecting a methodological approach that (a) was appropriate to answering our research question, (b) resonated with the philosophical values for knowledge development within our disciplines, and (c) fit our personal beliefs, values, and goals. With respect to our individual research questions, each of us had found gaps in knowledge related to our phenomenon of interest and lack of theory development in our areas of focus when developing our proposals. Qualitative inquiry is recognized as an appropriate approach for when little is understood of phenomena and can be used inductively to develop theory (Creswell, 2013; Polit & Beck, 2012). Thus, in consultation with our respective supervisors and committee members, a decision was negotiated to employ a qualitative methodological approach for our studies. Further, each of us believed that social interactions and process-

es underpinned the phenomenon we sought to understand in our respective doctoral projects. For each author this was the following: DN - nurses knowing the person in a virtual environment; VB - pathways into homelessness for older adults; CT - transitions of internationally educated nurses into Canadian practice settings; and DA - psychological impact of mistakes on health professionals. Since GT is recognized as a suitable methodology to gain an understanding of underlying social processes associated with a phenomenon (Charmaz, 2014; Corbin & Strauss, 2008; Glaser & Strauss, 1967), we concluded that GT methodology best fit our respective research questions.

GT originated with Glaser and Strauss (1967), whose foundational work shifted the focus from the dominant deductive and hypothesis-testing approach of knowledge development to an inductive, theory building mode of inquiry grounded in data (Charmaz, 2014; Creswell, 2013; Glaser & Strauss, 1967). Since the initial rendering of GT, there have been a number of variations of this methodology that reflect different ontological and epistemological perspectives of GT (Charmaz, 2014; Morse et al., 2009). Glaser continued to develop what he calls *classic grounded theory* that emphasizes an objective stance and emergent discovery of theory from the data (Glaser, 1978; Holton, 2007). Strauss and Corbin (1990) collaborated to develop qualitative analysis informed by Chicago School pragmatism and philosophies of symbolic interactionism (Charmaz, 2014; Corbin & Strauss, 2008). Charmaz (2000, 2006) proposed an approach to GT that overtly embraced a constructivist stance in qualitative inquiry, including co-construction of knowledge with participants and recognition of interpretation in analysis. Common to all approaches to GT are strategies of theoretical sampling, constant comparison, coding, and memo writing (Charmaz, 2014; Corbin & Strauss, 2008; Glaser, 1978). However, as we will elaborate later, there are many differences in philosophical perspectives to the various approaches to GT and in how methods are employed between the forms of GT.

We represent three disciplines from four different Canadian academic institutions and our areas of focus coincidentally have connections in the broad realm of healthcare. For three of us, our disciplines are practice oriented (i.e. social work and nursing) that involve direct care to individuals and are mandated to be evidence informed. For all of us there has been an emphasis on quality research, and, for most of us, there was a historical predisposition within our disciplines for post-positivist approaches to scientific inquiry. Although quantitative research has been more prevalent in most of our academic institutions, we found that supervisors and mentors generally had familiarity with GT, particularly that of Glaser and Strauss. This is not surprising, since GT has become more widespread in many disciplines and due to the perception of rigor that Glaserian and Straussian forms of GT provide.

Before selecting ConGT as best suited for our respective study foci and research questions, each of us had identified our paradigmatic inclinations as being constructivist with respect to research and knowledge development. First, we all believe that perception of reality varies between individuals, and there are pluralities of reality experienced by different people exposed to the same phenomenon. Further, we believe a singular truth can neither be objectively appreciated nor directly measured given differing perceptions of people and the complex nature of interpreting meanings of phenomenon; we hold this particularly applies to phenomena in the realm of social sciences and healthcare where our research is situated. This aligns with the constructivist paradigm, where subjectivity is embraced from an epistemological stance and where multiple realities are accepted in the construction of knowledge during the research process (Guba & Lincoln, 1994; Sandelowski, 1993).

We also believe participants' meanings of phenomena are not only shaped through social interactions, but are contextual and change over time. This is in keeping with Blumer's (1969) articulation of symbolic interactionism, which is recognized as the philosophical foundation to GT (Bryant & Charmaz, 2007; Charmaz, 2014; Corbin & Strauss, 2008). As well, each of us holds that social construction of meaning is heavily influenced by the interpretive nature inherent to social

interactions, which is amenable to and congruent with constructivist lines of inquiry. In the second edition of her book, Charmaz (2014) recognized the inescapable feature of interpretation when undertaking theory development in GT, an element we believe integral to our roles as constructivist qualitative researchers. Building on previous articulations of GT (Glaser & Strauss, 1967; Strauss & Corbin, 1990) Charmaz defines ConGT as:

A contemporary version of grounded theory that adopts methodological strategies such as coding, memo-writing, and theoretical sampling of the original statement of the method but shifts its epistemological foundations and takes into account methodological development in qualitative inquiry occurring over the past fifty years. (p. 342)

Charmaz's (2014) ConGT draws on analytical frameworks of both Glaserian and Straussian traditions, but honours the flexibility of researchers co-constructing theoretical explanations of phenomenon with participants. For three of us, this flexibility was seen as important since dynamic interaction with participants was integral to either illuminating social justice issues or enhancing human agency, both of which can be accommodated in ConGT (Charmaz, 2011, 2014). ConGT also acknowledges the researcher's paradigmatic orientation and experience brought *a priori* to the research project and encourages use of reflexivity by the researcher during the research process (Charmaz, 2014). As reflexivity is core to practice-based professions, this attribute of ConGT was seen by us as complementary to the nature of our disciplines. Overall, the philosophical underpinnings of ConGT and the methodological processes described by Charmaz fit with our research questions, disciplinary grounding, dissertation goals, and personal world views.

### ***Meeting along the Path***

The catalyst for this paper was our participation in the Grounded Theory Club based out of the University of Victoria, British Columbia (Schreiber, 2001), a virtual web-based twice monthly meeting between faculty and graduate students from various disciplines across Canada and the United States. Work of members within the Club represents predominant traditions of GT, including those of Glaser, Strauss and Corbin, and Charmaz, and provides a supportive environment to discuss GT philosophies, compare methodological approaches, and receive or provide feedback in dissertation and research work. For us, while we were trying to grasp and make meaning of the various perspectives of GT, the Grounded Theory Club has provided a sense of connection that enhanced our knowledge, allowed us to become more confident in our understandings of GT methodology, and helped lessen the sense of isolation experienced in the PhD trajectory. Even within this forum there can be passionate divergence in perspectives on methodological aspects of GT and application of methods and procedures from ontological and epistemological viewpoints, and privileging of one GT tradition over others.

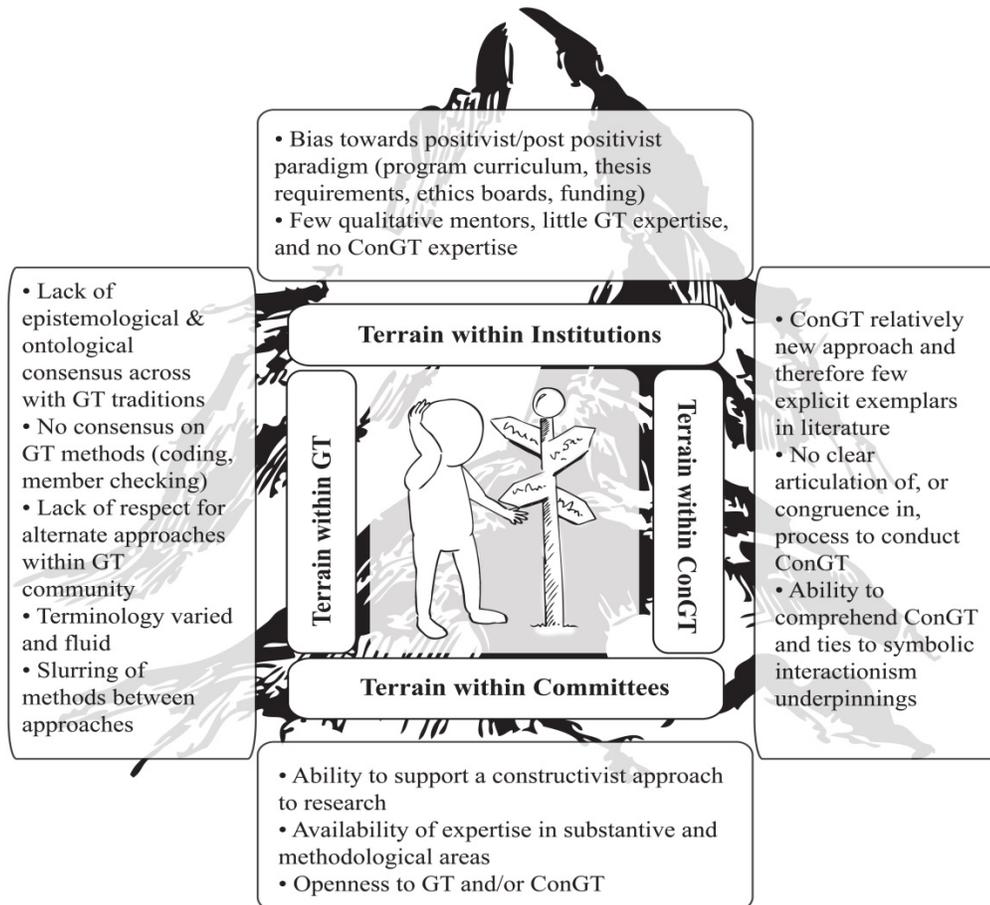
In sharing our experiences using ConGT, we realized other members had faced similar challenges in their PhD dissertation processes; this brought the four of us together to compare insights and learning using ConGT in our research, particularly in the context of our respective academic environments. Through conversations and subsequent work on this manuscript, we identified common hurdles, divergence in philosophical approaches and external influences that have shaped our individual educational experience, some of which relate to the history of our disciplines and our respective academic institutions. We also shared similar strategies and ways to navigate the sometimes unclear and windy paths of dissertation work using ConGT that might benefit future graduate students and the novice researcher.

In our review of the literature we found no articles specific to the experiences and challenges of PhD students using ConGT, and very little written in relation to the use of GT by graduate students more generally. A search of CINAHL, Embase OVID, PsychInfo and Medline databases up to October 2014 using key search terms of *graduate students*, *qualitative research* and *grounded*

*theory* yielded 457 articles. These articles mainly focused on doctoral students reporting research results or were related to GT methodology in dissertation work. However, we found two articles of doctoral students using GT that captured similar experiences to ours: Hunter et al. (2011) through our literature review and Wu and Beaunae (2014) through direct contact with Dr. Kathy Charmaz (personal communication, October 11, 2014).

## Standing at the Crossroads and Taking the Path Less Travelled

Wu and Beaunae’s (2014) metaphor for their experience with GT and Hunter et al.’s (2011) decision-making process in selecting GT resonated with us as they reflected some of the challenges we faced in our own journey. Examples of these challenges included distinguishing the paradigmatic attributes of main GT approaches, lack of clear articulation of methods and procedures (e.g., coding and analysis) in ConGT, and the necessity for us to familiarize other individuals involved in our dissertation work, such as supervisors and committee members, with ConGT methodology. As we progressed through the various stages of our research work, we continually grappled with methodological issues and returned often to what we see as the *ConGT Crossroads for PhD Students* (see Figure 1) to re-orient ourselves on the dissertation journey.



**Figure 1. The ConGT Crossroads for PhD Students.**

By the time we had progressed to development of our proposals and started our fieldwork, we realized that each of us had individually covered much terrain and navigated a maze of key decision points without benefit of a clear path or mentor expertise in ConGT. Although there were

many reference points to orientate ourselves along the way, such as seminal texts by key authors, we were often led astray by the vagueness and disagreement in the literature. In reflecting on, and synthesising, our collective experiences with ConGT, we mapped out some of the obstacles and unanticipated detours we encountered and categorized these challenges into three broad themes: 1) *Traversing the Topography of Paradigms and Research Traditions*, 2) *Crossing the Great GT Divide* and 3) *Bridging the Gap(s) Within and to ConGT*.

### ***Our preface on paradigms***

Before speaking to the three themes, we wish to be clear that we are not taking a position that adopting one particular paradigm is more correct or that there is a failing of any institution or school in being predisposed to positivism/post-positivism. We do, however, agree with Staller's (2012) position that paradigmatic influences shape the culture of academic environments and favour certain types of research, which can have an impact on educational preparation and research work of graduate students. We firmly believe that all paradigms play an important part in the development of knowledge for disciplines, and academic preparation of graduate students should include a balanced appreciation of all paradigms, grounding in various research traditions, and support in the academic environment to promote respect and inclusion of the diverse contributions of paradigms and research traditions to science.

### ***Traversing the Topography of Paradigms and Research Traditions***

Guba and Lincoln (1994) proposed that the metaphor of “paradigm wars” described in qualitative research by Gage (1989) is “undoubtedly overdrawn” (p. 116). While it would appear constructivist approaches are becoming more widely accepted, we suggest that the battle for recognition and unconditional acceptance still plays out regularly in most academic fields. In selecting ConGT, we often encountered resistance and some conflict having a paradigmatic leaning that differed with that of mentors, program curricula, the institution's Faculty of Graduate Studies, and ethics boards. This manifested through such dynamics as disagreements in analytical processes or adapting ConGT methods to fit institutional requirements thereby compromising our constructivist principles. In choosing constructivism, an alternative methodological approach to the predominant research tradition of our post-positivist educational settings, our challenges and hurdles seemed primarily related to paradigmatic and philosophical differences between us and institutional stakeholders. As we discovered, learning environments that are preferential to objectivist epistemological approaches made it particularly challenging to be constructivist in practice and completely faithful to the tenets of ConGT. Often we felt pressure to conform our intended approach to the dominant norms of institutional stakeholders; given post-positivist influences in our learning environments, we often experienced what we describe as a form of epistemological oppression. Some specific challenges we faced have included the following: a) biases inherent to the institution and program of study; b) selection of supervisor(s) and committee; c) the depth of literature review required for GT research and imposition of an a priori theoretical framework; and d) forcing of concepts in analysis.

### ***Bias inherent to the institution and program of study***

At a program level, the philosophical and research methodology preparation of students, or lack thereof, played a significant role for us in navigating ConGT. For two of us, the course work in our academic programs provided a solid philosophical foundation in the overarching paradigms and specifically addressed epistemological and ontological aspects of knowledge development. However, the other two had to negotiate this critical element independently through reading, peer seminars, and forums such as the Grounded Theory Club, and with little or no guidance in

ConGT within their program. We contend a deep and rich understanding of conceptual knowledge that attends to paradigmatic influences on knowledge development is foundational to good empirical research and is essential to the philosophical base of PhD education. Such conceptual knowledge and foundational preparation can facilitate the doctoral student's capacity to appreciate and evaluate epistemological and ontological underpinnings of the various GT traditions, to critically review associated literature and be prepared to defend adoption of ConGT (Staller, 2012).

Closely aligned with developing a philosophical foundation is another cornerstone of PhD education: preparation in, and receiving support for, a chosen research methodology. In comparing our programs of study, it seemed evident the overarching paradigmatic inclination of the schools was reflected in curriculum design and course availability. One author had a qualitative methodology course as a requisite requirement with quantitative research in the program of study, and another was able to choose just a qualitative research course in support of dissertation work. However, one author had to choose a qualitative course outside of the program as only quantitative courses were offered in the program, while for the remaining author qualitative research was an optional course over and above three mandatory quantitative courses. These latter situations highlight the primacy of post-positive inquiry inherent to some programs and disciplines. This aligns with Staller's (2012) position that programs where "students are required to take statistics courses but not qualitative data analysis courses essentially privilege and institutionalize 'positivist orthodoxy' through policy" (p. 3). From our perspective, this seems to reinforce a form of epistemological oppression on graduate students who are constructivist oriented.

While further empirical exploration of graduate study andragogy might be useful to examine the association of curriculum and course design to prevailing paradigmatic viewpoints of a program, it seems logical that such a relationship would potentially impact a student's ability to utilize ConGT, as well as a program's capacity to provide appropriate and effective support, including supervision and mentorship. It was necessary for two of us to seek required qualitative expertise outside the program to support the research process by recruiting committee members from other disciplines. We also sought out alternative resources, such as the Grounded Theory Club and the International Institute for Qualitative Methodology (IIQM) conference and workshop. We agree with other authors that independence, motivation, and interdisciplinary perspectives are important aspects in the educational and professional development of doctoral students, however we also believe it is essential that structural, theoretical and philosophical support is present to support student success (Liechty, Liao, & Schull, 2009; Staller, 2012).

### **Selection of supervisor(s) and committee**

One of the most important decisions a student will make in graduate studies is choosing a supervisor and committee members to help guide the research process. There are a number of considerations a student takes into account, foremost being academic reputation, knowledge, common interest, personality, and time commitment among other criteria (Liechty et al., 2009; Nutov & Hazzan, 2011; Ray, 2007). However, if choice of supervisor is based solely on these criteria and does not account for paradigmatic alignment or methodological expertise, this can be problematic for the doctoral student choosing ConGT. While paradigmatic differences can be resolved when there is mutual respect for paradigmatic perspective and mentors are supportive to constructivist qualitative research, this may be challenging in programs and institutions that are greatly influenced by deeply entrenched objectivist epistemological assumptions. However willing and able mentors may be, we have experienced the effect of "epistemological unconsciousness" (Staller, 2012) where mentors and we, by necessity, would default to stakeholders' preference of post-positivism.

While expertise in substantive area, knowledge of research methods, and interpersonal connection are critical in successful mentoring of any PhD student (Nutov & Hazzan, 2011; Walker, Golde, Jones, Bueschel, & Hutchings, 2008), use of ConGT requires an appreciation of, and support for, a constructivist perspective in relation to GT methodology. Since our personal goal was to be faithful to the tenets of ConGT, a view of ConGT as a methodology and not merely an analytical framework would have been ideal in supporting our methodological development. However, selection of a supervisor and committee member with a qualitative research background, specifically for GT (Glaser, 2014), and a constructivist philosophy may not be possible in the program of many disciplines. For instance, one author started in a program with a strong post-positivist culture and established quantitative research tradition where there was only one tenured professor on faculty formally prepared in qualitative methodology. While supportive of constructivist approaches to inquiry, this faculty member was not available as either supervisor or committee member due to high demand of expertise; the author transferred to another university program for a better philosophical fit and necessary GT mentorship.

Lack of methodological expertise in a program can pose challenges; however two authors did experience great receptivity and support in adopting a constructivist approach. One author had already been assigned to, and formed a good working relationship with, a supervisor and committee members who were not grounded theorists, but whose philosophical perspectives tended towards a constructivist paradigm. Another author was in a program intentionally not aligned with a particular paradigm or research tradition and that encouraged students to embrace a more flexible methodological approach. The generalist nature of this approach, however, presented other difficulties as there was not sufficient expertise focused in methodology to provide solid mentorship for ConGT. To help address the gap of expertise and mentorship for use of ConGT, most of us sought out opportunities at personal expense to attend workshops and seminars, such as the Odum Institute at University of North Carolina, to work with scholars like Charmaz to develop our knowledge, skills, and confidence in using ConGT.

### ***Requirement of a priori literature review and theoretical frameworks***

Two original core principles of GT are to limit exposure to literature prior to beginning research and not use a conceptual or theoretical framework *a priori* to inform the research process (Glaser, 1998, 2009; Glaser & Strauss, 1967; Hunter et al., 2011). The rationales for these constraints are to minimize researcher bias during the data collection and analytical processes and to help minimize imposition of preconceived conceptualizations influencing the theory development (Charmaz, 2006, 2014; Glaser, 1978, 2012). With respect to the first principle, *a priori* grounding in literature has been recognized as being virtually inescapable since all researchers come to the field of inquiry with some level of exposure to literature; to this end, there has been more acceptance to literature reviews in advance of GT research (Bryant & Charmaz, 2007; Charmaz, 2006, 2014). For PhD students, in-depth literature reviews are usually a requirement in course work, preparation for comprehensive examinations, and development of research proposals; these reviews are an expectation of supervisors and the institutions to demonstrate a student's knowledge in the field and provide adequate background for research ethics board [REB] approval (McGill University, 2015; University of Ottawa, 2012; University of Victoria, 2014). Further, granting agencies for scholarships, fellowships, and research funding require substantial literature reviews to support elements of the research process as part of the application process (Glaser, 1998; Wu & Beaunae, 2014).

However, a key challenge is determining how much is too much immersion in the literature; conceivably there is a risk for the PhD student, or anyone doing GT research, to become so saturated with *a priori* concepts, theories, models, and frameworks that it is impossible to reasonably guard against perceptions of bias. Charmaz (2014) and Glaser (1998) recognized this expectation and requirement of immersion in literature for graduate students. Charmaz suggested researchers "let

this material lie fallow” (p. 307) until categories are developed, while Glaser recommended that the literature be turned into part of the data collection process. For us, immersion in the literature occurred throughout our course work, comprehensive exams, and proposal writing, and it was so ingrained that we had to do more than simply set the material aside. We felt compelled to engage in higher levels of reflexivity using activities, such as memoing and free writing, to overtly acknowledge and contextualize our *a priori* exposure. While one may employ strategies like these to minimize bias, they may not be viewed sufficient enough to meet QDA requirements of rigor often adjudicated vis-à-vis more post-positivist expectations and measures. We further contend that GT researchers can only engage in meaningful reflexivity of conscious thoughts that arise during data collection and analysis and cannot account for subconscious influences associated with *a priori* exposure to literature and experience.

As an example of *a priori* influence, one author was required to compare and contrast at least two existing conceptual models or frameworks relevant to the research focus as a requisite comprehensive exam question. The author brought to the examination committee chair’s attention that *a priori* use of models or frameworks is discouraged given the goal of GT is to generate an original theory. However, the author was informed that a conceptual framework helps to guide development of research for novice researchers. The rationale of requiring an *a priori* framework or model for novice researchers is not empirically supported in the literature and, contrary to notions of rigor for GT specifically, the imposition of such background work risks contamination of the final theoretical product with intentional introduction of bias to the research process. Thus trustworthiness of the study, specifically credibility, could be justifiably regarded as compromised through interference with the design and methodological approach to the research.

### **Forcing the concept(s)**

For two of the authors, there was the added burden of being required to start with a central premise in mind during development of the research proposal and to further align the research question and sub-questions accordingly. As well, once coding and analysis began, there were instances where mentors and committee members not immersed in the data lobbied to have specific concepts represented in the findings. However, the intent in all GT approaches is for concepts to earn their way into the theory, whether through emergence or construction (Charmaz, 2014; Glaser, 1978, 2012; Glaser & Strauss, 1967). These situations illustrate how preconceived viewpoints can impose a more reductionist or deduction-oriented influence to analysis and compromise the trustworthiness and integrity of a ConGT approach. As Glaser (1998, 2014) notes, in specific reference to classic GT, there is potential of forced preconceptions in mentee-mentor relationships often due to lack of understanding between tenets of GT and QDA. Compounding this is the challenge students have to confidently take a stance on paradigmatic and research design issues with mentors when discordance in viewpoints occurs and there is perceived or real imbalance in power balance; students may feel resigned to giving committees what they want to facilitate progression in the research project (Lukerhoff & Guillemette, 2011), further compromising the integrity and trustworthiness of the study.

### **Crossing the Great GT Divide**

As each of us progressed in developing our proposals, we encountered vastly divided perspectives in the literature on methods and procedures for GT, lack of consistency in terminology across the main GT approaches, and lack of agreement of how post-positivist and constructivist paradigms are (or are not) reflected in the three main approaches. These dynamics seem to stem back to the original philosophical underpinnings of GT and what we see as an incommensurable tension between post-positivist views of GT and more interpretive, co-constructed lines of theory development. Staller (2012) recognizes this tension, noting that “well-known scholars disagree and ‘sort’

these ideas differently” (p. 13) and that boundaries in relation to methodology and methods can be fluid. As such, we have found divergent views on basic GT methods, such as determining sample size, coding, and analysis; we also found disagreement on the meanings and importance of concepts like emergence, reflexivity, and verification in GT.

## **Paradigmatic orientations of GT**

As we illuminate here, our experience has been that there exists divisiveness within the various camps of GT related to the paradigm influences we described earlier; paradigmatic schisms in GT approach have been around for decades and are well-recognized in the literature (Schreiber, 2001). Although Glaser states he does not ascribe to any particular paradigm leaning (personal communication, January 16, 2014), the processes of data analysis and rigidity of the classic GT approach suggests a post-positivist flavour; this view is supported by numerous authors (Bryant, 2003; Charmaz, 2014; Staller, 2012). While Straussian GT seems to have shifted to a more interpretive style of theory development, the view of some authors is this form of GT retains a structured and more prescribed approach to coding and data analysis (Glaser, 1992, 1998; Hunter et al., 2011). While Charmaz takes an overt stance advocating a constructivist approach to GT, there is much critique on her articulation of ConGT, both written (Glaser, 2002a) and informally in discussion, such as in the Grounded Theory Club. Although critique is to be expected when a bold, innovative approach is offered and is undergoing its own evolution, for the doctoral student it can make taking a position on ConGT quite daunting, particularly in the absence of experienced supervisory mentorship.

As an example of the criticism, Glaser has taken exception to deviations from classic GT often being quite blunt and acerbic in his criticisms of alternative perspectives, including Strauss and Corbin’s (1990) book on GT (Glaser, 1992) and Charmaz’s ConGT (Glaser, 2002a). Ironically, Glaser (1998) labelled the rhetorical wrestling in GT as “a waste of time, tiresome, and goes nowhere” (p. 35). Even within the supportive environment of the Grounded Theory Club, there are divergent viewpoints and varied levels of agreement on philosophical and paradigmatic foundations of GT. The dynamic (and sometimes colourful) scholarly discourse and tone of dialogue within the literature and discussion forums has given us occasional cause to question our adoption of ConGT. As we have discovered, lack of agreement and conciliation of the broader paradigmatic philosophies in GT approaches has direct implications in the choice and defence of methods and procedures a doctoral student must make in ConGT, often requiring a contrary stance to more traditional views of GT. Thus, we believe, it is important for a student to explore his or her paradigmatic stance and be confident in supporting one’s worldview and selection of ConGT.

## **Lack of “road maps” for GT and ConGT**

A major gap we have found in the literature is full explication and philosophically balanced rationales of all forms of GT in the main indexed databases of peer-reviewed scholarly research journals. For example, our literature review of journals did not yield any research study protocols for a GT study, aside from those presented in available graduate student dissertations. In contrast, there are numerous published quantitative protocols available to doctoral students. While we do not ascribe to recipe or “cookie cutter” approaches to any form of qualitative research, we do believe that drawing from examples would facilitate development of the doctoral student’s knowledge and confidence in planning and executing a ConGT study. Given the complexity and extensive narrative required in articulating all considerations of qualitative research, often explicit description of methods and procedures is sacrificed for presentation of results and discussion in the face of maximum word limits; the reader is left to accept at face value that steps in constant comparison, theoretical sampling, and theoretical sufficiency have been satisfied.

As one author discovered, it is not just manuscript length that limits publication of GT and ConGT protocols but that paradigmatic influences and lack of understanding of qualitative research by journal editors may factor into the equation. For example, upon submitting a ConGT research protocol with a legitimate sample size typical of a GT study to a peer-reviewed journal, one of the authors received the following response from the editor:

We felt that the scope of the study and the number of the participants involved were inadequate for the publication of a study protocol in [peer-reviewed nursing journal]. We would however be delighted to consider any research articles arising from the completed study (personal communication, April 30, 2014).

This comment underscores the ongoing battle for authors to advance understanding and broader acceptance of qualitative research like ConGT.

### **Divergence on core GT methods**

There is little agreement in the literature across the main GT traditions on some key elements for methods and procedures, such as sample size, coding, and verification. In the case of sample size, there are broad variations across GT ranging from 20 to 30 participants (Creswell, 2013; Polit & Beck, 2012), 25 participants for a small study (Charmaz, 2006), to simply achieving theoretical saturation (Corbin & Strauss, 2008). We understand a specific sample size will be contingent on the various forms of data gathered, including interviews and observations; however, insufficient or vague estimates are not likely to satisfy journal editors, REB reviewers or, potentially, examiners unfamiliar with qualitative research and, specifically, GT (Staller, 2012). In our situation, each of us made an informed estimate in our research proposals based on the resources at hand, previous GT research reports similar to our proposed studies, and on the anticipated availability of participants for our research question. From a pragmatic angle, the estimated sample size ranges for our studies were a balance between methodological soundness, rigor, and feasibility for a doctoral study.

One example of divergent views regarding methods is use of *member checking*, a controversial practice of validation or verification when incorporated into GT. Glaser (2002b) takes one position that member checking is not appropriate due to the level of abstraction of theory that moves meaning of concepts from the participant's comprehension, while Charmaz (2014) presents strategies to incorporate nuanced forms of member checking for verification of findings with participants. It was important for us to resolve debates like these for ourselves since member checking is generally equated with rigor from a post-positivist stance, is often encouraged and/or expected by mentors, and is frequently built into a research proposal to facilitate acceptance by REBs. Our belief is that co-construction, as a fundamental principle of constructivism, requires some form of involvement of participants beyond just the initial data collection (e.g., first interview) and a variation of member checking, or some process to share evolving categories for input, would be essential to ConGT. We pose the caveat that such involvement of participants for co-construction must be contextually appropriate and mindfully integrated in a ConGT research design to mitigate Glaser's concern of participant comprehension and guard against a post-positivist application of validation or verification.

### ***Bridging the Gap(s) Within and to ConGT***

There were a number of practical challenges we immediately encountered in adopting ConGT and beginning dissertation work. The first challenge, as noted previously, was that while much is written about use of Glaserian and Straussian GT and, thus, clearer examples of published research, researcher experience and critiques to draw from, very little has been written about ConGT. The relatively recent presentation of ConGT as a methodological approach (Charmaz,

2000, 2006, 2014) has yielded few well-described ConGT studies to use as exemplars in our formation as researchers or to illustrate how ConGT might be articulated for the benefit of supervisors, PhD committee members, and ethics boards. While we believe the essence of a constructivist approach to GT has been articulated by other authors, such as MacDonald and Schreiber (2001) who present a postmodern perspective on GT, Charmaz (2000) was the first to overtly advocate and label ConGT as a methodological approach. Charmaz (2006, 2014) then elaborated on possible methods and procedures in a ConGT approach.

Because of the recent advent of ConGT, we found many of the methods, procedures, and processes associated with ConGT have not been well explicated, nor are the philosophical underpinnings of constructivism and symbolic interactionism well-articulated in published research reports and articles. Having such resources specific to ConGT would have helped us to better support our choices in methodology, methods, and procedures and would likely have assisted us in communicating our processes more effectively to others supporting our work. However, with the resources available and through our own initiative, we have successfully navigated to this point in our respective paths and overcome challenges by creating bridges in gaps of knowledge and skill in ConGT for ourselves, our supervisors and committee members.

### **Developing our own capacity for ConGT**

We have found our way to this point in our ConGT dissertation journey with little formal mentorship in this methodological approach, having to rely on our own innovations, motivation, and, at times, sheer tenacity. It has required us to draw upon numerous resources, such as the literature and peer support, to enhance and test our own philosophical foundations in GT research and to develop the confidence to navigate and defend our epistemological and ontological choices for ConGT. Glaser (2009) would seem to support this as an effective way to develop competence in GT, suggesting that mentors without formal GT backgrounds can undermine skill development and openness to possibilities and can impose preconceived categories. In hindsight, the three most important aspects of developing our capacity for conducting ConGT research were to clearly identify the paradigm that we ascribe to, find resources to develop our knowledge and skill in utilizing ConGT, and acquire foresight to anticipate challenges and barriers in our dissertation journey.

As articulated earlier, we each had come to a point of rationalizing the inclination and appropriateness in adopting a constructivist approach to our dissertation work. The very philosophical nature of this aspect, alone, was crucial to selection and justification of ConGT as our methodological approach and has facilitated our abilities to critically think through the choices we have made for the methods and procedures of our work. While not all of us were formally prepared in our academic programs to consider research paradigms, the less travelled path we chose has afforded us a great opportunity to evolve in our own thinking of the epistemological and ontological foundations in qualitative research, specifically ConGT. This has largely been an iterative process, requiring us to seek out and incorporate resources that enhanced our academic and professional growth, such as seminal literature, mentors outside our academic programs, peer groups, workshops, and conferences to share ideas and receive guidance. Communicating and working directly with researchers, such as Kathy Charmaz and Rita Schreiber, has been especially beneficial for us in exploring and teasing out some of the methodological nuances for employing ConGT.

Finally, identifying strategies to anticipate and address challenges and barriers in using ConGT has been one of the most significant learning opportunities for us – in retrospect, much of this has occurred through trial and error and often realized at difficult and stressful points in our dissertation process. We now appreciate, as PhD students, how important it is to identify academic programs and institutions that closely align with one's own philosophical stance or, at the very least,

can provide support for alternate approaches to research and knowledge development. Within this scope, we now recognize how critical academic preparation is for differentiating between methodological approaches and conceptualizing research designs through available courses, supervision, and mentorship. Importantly, our experiences have provided us with strategies to identify gaps in support for ConGT at the academic level and to anticipate the information and knowledge needs of our dissertation stakeholders, such as the program, the institution, supervisors, and committee members.

### **Bridging ConGT to supervisors and committee members**

Most of us had the opportunity to consider and negotiate our PhD supervision and committee membership at some point in the dissertation process, however the predominant influencing factor was substantive area first and, then, methodological support second. Little, if any, consideration was given to paradigmatic fit with supervisors and committee members at the start, and with ConGT being a more recently defined methodology, none of us had support of faculty with formal experience using ConGT. As Staller (2012) pointed out, “If those doing the assessing do not share your epistemological orientation you may face the added burdens of needing to educate others about epistemological difference” (p.18). Thus, throughout our dissertation process we needed to become intimately aware of our supervisors’ and committee members’ knowledge and comfort with both qualitative research and a constructivist approach to inquiry and to find ways to mitigate the gaps. In retrospect, our quest to authentically pursue a more genuine ConGT approach would have been better facilitated had those supporting our work had a blend of substantive area, methodological expertise, and paradigmatic fit.

The main ways we educated others was through providing resources to our supervisory team, crafting strong rationales based on evidence from the literature, and explicating our research processes to demonstrate rigor from a more post-positivist angle. An essential lesson we learned was to determine what information to present and how best to prepare supervisors and committee members in advance of meetings. To advance this strategy, preparing a brief synopsis of key points related to ConGT, in either document or PowerPoint slide form, along with references generally worked quite well. It may be necessary to advocate a particular position contrary to mainstream research expectations, such as use of member checking; so anticipating this and crafting a strong rationale with supporting references in advance can be beneficial for keeping the project on track and in girding the philosophical base of ConGT inquiry.

One of the most useful tactics we found in conveying our ConGT research process to supervisors and committee members, particularly those with a quantitative background and more positivist inclination, was to regularly update them on our research steps, explicate analytical processes, and present project updates in ways that reflected traditional notions of rigor. For example, one may be expected to ask the same set research questions of each participant as articulated in a question guide although theoretical sampling is the aim in any GT approach. A solution is to spend less time on set questions with each successive interview and gear probes in line with evolving categories. Another strategy we used was to tabulate coding responses into numerical data to reflect frequencies of responses to demonstrate representativeness and importance of codes as theorization advanced; although contrary to the essence of constructivism, this was seen as a necessary step to secure buy-in from the committee and mitigate imposition of *a priori* concepts.

## **Sharing Our Journey with Others: Helping Define Paths in ConGT Research**

In reflecting on our respective journeys and lessons learned, we have come to appreciate that undertaking PhD dissertation work using ConGT can be challenging, time-intensive and, yet, quite rewarding. While pursuing a constructivist approach to research can be unique for each doctoral student, we have discovered many experiences common to our ConGT research project trajectories. We recognize now that our path to completion might have taken fewer detours and had less challenges with clearer directions and guidance, however we accept that this has been key in our learning and doctoral preparation. In presenting our experiences here, our intention is to share our journey and learnings with other PhD students planning to undertake ConGT research and academic stakeholders, and to offer potential guidance vis-à-vis a summary of our recommendations (Table 1).

### ***Get Your Paradigmatic Bearing and Set Your Compass***

We suggest that the first step a student should take is to carefully consider his or her own paradigmatic inclinations and make decisions, such as choice of program, that align with one's own personal philosophy. Only two of us had exposure to understanding epistemological and ontological perspectives in our master's level of graduate studies and, as we have presented, not all programs may adequately prepare PhD students in these requisite fundamentals. We posit that university graduate education programs which do not have a requisite philosophy course for students to explore paradigms in-depth and/or only offer qualitative research courses as optional offerings may not be in the best position to support doctoral students who pursue constructivist lines of inquiry such as ConGT. It may default to the student to discern and address gaps of philosophical preparation in educational programs and curricula to ensure adequate preparation in the dissertation process.

### ***Plan Ahead for the Journey***

While in an ideal world a PhD student would have the requisite resources to successfully navigate completion of a dissertation, such as requisite courses and expert mentors, this is not possible or practical in many educational settings. It is necessary for the student to consider implications of adopting ConGT in advance of starting dissertation work. We recommend that the student think about what he or she will need from the program, mentor relationships, and institutional structures to attain goals, and to proactively do an inventory of resources and plan out strategies to meet these goals. This is important, since as we have presented it was necessary for us to seek supplementary learning opportunities and support elsewhere to realize our own success. This has practical implications in terms of resource access, costs and time.

**Table 1. Recommendations and potential strategies to consider in adopting ConGT**

	<u>Recommendations</u>	<u>Potential Strategies</u>
<p style="text-align: center;"><b>Get Your Paradigmatic Bearings and Set Your Compass</b></p>	Explore your own paradigmatic leanings	<ul style="list-style-type: none"> <li>• Familiarize yourself with the literature of paradigms and conceptual knowledge</li> <li>• Take a philosophy course on conceptual knowledge development and the nature of paradigms in scientific research</li> <li>• Write a short essay declaring your paradigm inclination</li> </ul>
	Fortify your foundational understanding of the development, methodology and various approaches to GT	<ul style="list-style-type: none"> <li>• Conduct an extensive literature review on GT and ConGT before choosing one approach over the other</li> <li>• Develop a library of essential textbooks, articles, and references; although books are expensive, seminal resources are invaluable</li> </ul>
	Consider what resources you need and what is available to you	<ul style="list-style-type: none"> <li>• Determine what you may need to be successful in realizing your research goals; if you need access to alternative resources outside your program, think about logistics and cost</li> <li>• Connect with other students and mentors who use GT</li> </ul>
<p style="text-align: center;"><b>Plan Ahead for the Journey</b></p>	Reflect on what you will require in a supervisor and PhD committee	<ul style="list-style-type: none"> <li>• Consider a potential supervisor and committee members based on knowledge of, and philosophical leanings towards, qualitative research and a constructivist paradigm; have a frank discussion</li> <li>• Be aware that some programs assign you a supervisor; decide whether this will work for you</li> </ul>
	Select an academic program that fits with you and your goals	<ul style="list-style-type: none"> <li>• Review academic program and institutional philosophy statements</li> <li>• Consider the program’s curriculum, the courses offered, and the research backgrounds of tenured faculty; if you suspect you will do ConGT or any qualitative research, select a program that offers requisite courses</li> <li>• If the courses you need are not available at the institution, consider your alternatives for access to courses and workshops</li> </ul>
<p style="text-align: center;"><b>Fortify Yourself</b></p>	Prepare for the bumps along the road	<ul style="list-style-type: none"> <li>• Accept that ConGT does not have a “cookie cutter” approach, as it is relatively recent and is continually evolving</li> <li>• Be prepared to defend the ConGT process that you adopt</li> <li>• Pick your battles wisely; conformation may be necessary</li> </ul>
	Anticipate needs of others and timelines	<ul style="list-style-type: none"> <li>• Know your supervisor, committee members, program and institution; understand the needs/requirements of all stakeholders</li> <li>• Be well prepared and plan far in advance</li> <li>• Allow others, and yourself, lots of time</li> </ul>

## **Fortify Yourself**

We learned in our processes that dissertation work, particularly qualitative research like ConGT, is time intensive and requires stamina, tenacity, and personal nourishment – it is a long haul. The length of time for completing a PhD can be quite variable, but the usual timeframe is five to six years. The average time for us to complete course work, including any extra courses to support ConGT, was 20 months (range 12 – 24 months) and then an average of 12 months (range 10 – 14 months) to complete comprehensive exams, write our proposals and submit to ethics. And while we are at varied points in our research processes, ConGT requires time for data collection, analysis and theory development; we forecast our average time to completion will be approximately five years. As we discovered, it has taken a lot of extra time and effort to effectively convey our ConGT work to supervisors, committee members, and other institutional stakeholders largely because of the lack of familiarity with this methodological approach – thus a great lesson learned was anticipating the needs of others in the process. Through preparing oneself thoroughly by building paradigmatic understanding, making thoughtful choices in advance, solidifying knowledge of ConGT throughout the research process, and finding necessary supports, a prospective doctoral student should be ready to meet the challenges in the dissertation process.

## **Conclusion**

For any doctoral dissertation, the PhD candidate must be able to rationalize and defend each choice made in the research design. A perplexing, and often overwhelming, part of preparing for the ConGT journey for us has been gaining insight to one's own understanding of the epistemological, ontological, and methodological underpinnings of our chosen research design for our dissertation journey. Given the rich history and evolution of GT since the seminal work of Glaser and Strauss (1967), not only does the terrain involve mountains of scholarship, but the road forks into several branches of GT and there are significant gaps to bridge between some very divergent viewpoints for ConGT. Further, there can be contentious landscape to navigate given passionate differences of viewpoints and, in some cases, very entrenched positions on what constitutes appropriate approaches to GT methodology.

While it has been a long and, at times, difficult journey in having selected ConGT for our doctoral work, we have each learned much about the ontological, epistemological, and methodological considerations for research on our less travelled path – from each other, from our mentors, and from the dissertation process. In choosing a divergent road in GT and facing in adopting a constructivist approach for our research design, we had embarked on a challenging but rewarding journey. And for us, in the words of Frost, "...that has made all the difference."

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## Biographies



**Daniel (Dan) Nagel** is currently an Assistant Professor in the School of Nursing at St. Francis Xavier University (Antigonish, Nova Scotia) and is also a doctoral candidate at the University of Ottawa with a research focus in the use of telehealth technology in nursing practice. Dan previously taught in baccalaureate nursing programs in British Columbia and Ontario, and also developed and taught a graduate level qualitative research course. In addition to teaching, Dan has worked in a range of nursing practice settings, including ICU, community health and primary care, and his experience includes leadership, change management, research, and curriculum development.



**Victoria Burns** recently completed her doctoral studies at McGill University's School of Social Work and is a postdoctoral fellow at the Institut National de la Recherche Scientifique, Urbanization, Culture, and Society Research Centre in Montréal, Québec. Her doctoral work on older adults' pathways into homelessness was informed by several years of social work experience in home care and community outreach with marginalized older adults. Victoria is also a sessional instructor at McGill and has taught Social Policy and Administration at the undergraduate level, and Social Care as a master's seminar. Her broad research interests include social gerontology, homelessness, living environments, social policy, social exclusion, and qualitative methodologies.



**Carla Tilley** is currently a faculty member with the Vancouver Island University and a PhD candidate in nursing at the University of Victoria. Carla's interests include curriculum development and educational programming for a variety of health care disciplines, and her doctoral research is focused on support for internationally educated nurses. Her other experiences include nursing in a number of clinical settings, clinical education, leadership settings, and work as a practice consultant.



**Diane Aubin** has a PhD from the Department of Educational Psychology at the University of Alberta, where she completed a qualitative study for her dissertation on the psychological impact of mistakes on health professionals working in pediatric hospitals. Her interest in health services research was first sparked by her work with the Canadian Medical Protective Association (CMPA), where she contributed to numerous publications on such topics as disclosure, team communications, and fostering a just culture of safety. Diane also worked for the Canadian Patient Safety Institute (CPSI) as the lead on research projects supported by CPSI, collaborating with researchers from across the country to promote patient safety research. She is now Associate Director for the Career Development in Methods & Health Services Research platform of the Alberta SPOR (Strategies for Patient-Oriented Research) SUPPORT unit. Her academic interests also include interprofessional education (IPE) and technology in education. She lives in Edmonton, Alberta.