

# Unpacking Grounded Theory: Treading the Murky Waters

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## Abstract

When researchers select a methodology or method, they have to be careful not to merely apply watered down versions of them to their research by simply making overgeneralized or ill informed claims to be using them without being transparent of their applications. In the past few decades, grounded theory has been increasingly popular in educational research. Although it first emerged in research in the health field, there has been a growing number of EFL (English as a Foreign Language) research studies that have adopted grounded theory as their appropriate method. However, researchers using grounded theory have not always been clear on which variation they are using. When selecting grounded theory, the researcher needs to be particularly aware that as grounded theory has become more known to researchers and used in many different ways to address research inquiries, it has developed in diverse directions with different variations. In this paper, an attempt will be made to clarify the variations of grounded theory by first reviewing an EFL case study on leadership that sets out to apply grounded theory and then to demonstrate which variation should be selected. In the process of selecting the appropriate version, the following questions are investigated: What are the fundamentals of grounded theory and its variations? And what constitutes an ontological, epistemological, and methodological framework for grounded theory study? These questions are addressed through an overview of some essential characteristics of grounded theory. In doing so, this article outlines grounded theory as a research perspective and method, and how it has evolved since its

introduction in 1967. Several variations of grounded theory are also discussed. The study finally shows the rationale for why the constructivist version has been selected.

Keywords: grounded theory, EFL, ontological, epistemological, methodological, constructivist

### **Introduction**

Researchers have been using grounded theory since it emerged almost 50 years ago. However, there has been confusion over how it should be carried out. This is partly due to researchers who have included it as a framework in their studies without fully understanding its principles and procedures. The comprehension of what grounded theory is and the procedures the researchers should adhere to have been further clouded by the differing views of its founders and leading proponents. The purpose of this paper is to hopefully add some clarity by showing the process of selecting the appropriate variation of grounded theory that would be an applicable research framework that I was seeking for my own study. In carrying out this process, the underpinnings that form the variations are depicted. First, an outline of my study setting up its proposed intentions is presented to show why grounded theory would be an appropriate fit. Then, various forms of grounded theory are delimited through surveying the literature. This is conducted to illustrate what the researcher needs to know when setting out to use grounded theory. Finally, the rationale for selection of constructivist grounded theory as the most suitable variation for my study is shown.

### **Framing the study**

In order to conduct a study to find how the Japanese teachers I work with at the same grade level perceive the implementation of the English in principle (EIP) policy suggested in the new course of study issued by the Ministry of Education in 2011, I needed to decide on a research method that would be applicable to my research aims. I especially wanted to look into how teacher leaders impact their colleagues in the process of having them implement a policy change like the EIP policy.

There are several studies (e.g., Tsukamoto & Tsujioka, 2013; Saito, 2017) conducted with the intent of investigating how Japanese teachers of English (JTEs) perceive the EIP policy before and during its implementation. However, there are few studies investigating the role that leadership can play in getting the JTEs to actually implement it. Thus, I wanted to investigate how utilizing a concept termed ‘adaptive leadership’, which takes an active view toward getting the participants to take interests in their own self-development, might allow them to adopt the policy. In taking this approach, if there is someone who can be a catalyst in applying principles of adaptive leadership, then those who are impacted by it can take initiatives in making changes

to successfully implement the policy.

In this study, I have a particular participatory role because of my appointed position of a Shunin (in charge of the English department). In this role as a leader, I am able to put forth ideas associated with adaptive leadership while working with the participants. In other words, I would be a co-generator of data in the study (which we will see later had an influence on the type of grounded theory I would select for my study).

Teacher participants involved in this study are three in-service tenured JTEs (one male and two female), teaching second year students at a public high school in Fukuoka Prefecture. All of the teacher participants agreed to conduct their classes according to the EIP policy for one year, and I have been collecting data by observing their classes on a regular basis and interviewing them during the period. This longitudinal data would allow me to compare not only the teacher participants' beliefs, stances, and actions with each other, but also their responses and experiences at multiple points in time.

Concerning a methodological approach to this study, a qualitative methodology was found to be more suitable and appropriate than quantitative methodology. Lacono, Brown, and Holtham (2009) state that the reason why qualitative analysis is preferably adopted in particular studies is that if what is being textually documented is what the participants are telling the researcher as units of analysis from their viewpoints in a broader or holistic context that they are operating in, then textual data that is quantified will be too limiting and reductionist in scope. That is, without considerations of contextual influences on participants' thoughts and actions, then richer understandings of their viewpoints will be lost.

Taking the nature of my study into account, therefore, I decided to employ grounded theory as a method for this study. I was convinced that grounded theory would likely allow me to construct a credible mid-ranged theory, which could be applicable to real practical situations (such as teaching), and I felt supported by Glaser and Strauss's (1967) argument that grounded theory provides a method of developing a theory that is credible and applicable in a specific situation (e.g. within the context of a school environment). These are two criteria for theories grounded in data commonly suggested by major grounded theory scholars (e.g., Charmaz, 2014; Corbin & Strauss, 2015; Glaser and Strauss, 1967). As a result, I became convinced that the use of grounded theory would enable me to eventually construct a substantive theory grounded in data from these teacher participants as a way of theoretically interpreting and explaining social action and phenomena embedded in a specific situation.

After it was clear that grounded theory would be an appropriate method, I needed to find a suitable version of it that would fit the situational design of my study taking place at a school site, including my role as the researcher. What I had to take into consideration was that whatever variation of grounded theory I had chosen for my study, it would be consistent to what I wanted to investigate in the research conducted. With regard to this point, Nunan (1991) posits,

I take the view that in carrying out research, the issue or question one wants to address should form the point of departure, and the research method or methods one chooses should be consonant with what it is that one wishes to discover. (p. 250)

His argument is that it is necessary for researchers to select an appropriate method according to research questions or problems they want to address in their studies. This holds for selecting an appropriate version of grounded theory as well. Therefore, in this study, I attempt to outline grounded theory as a research perspective and method, and to demonstrate how grounded theory has evolved into several variations since its introduction in 1967. I also would like to show how this discovery process on my part led to the selection of a particular version for my study. In doing so, several variations of grounded theory will be discussed. First, in order to gain a fundamental understanding of what constitutes grounded theory, I needed to comprehend an overview of some essential characteristics of grounded theory.

### Grounded theory

According to Tavakol, Torabi, and Zeinaloo (2006), many of those who take a positivist stance in research critique qualitative approaches for being unscientific and merely anecdotal. In order to address such a critique, Glaser and Strauss (1967) developed grounded theory. In their book entitled *The Discovery of Grounded Theory*, they generated a set of rigorous procedures for analyzing social processes and constructing theory.

*The Discovery of Grounded Theory* was published with its attempt to argue that grounded theory would provide a clear basis for systematic qualitative research in response to positivistic approaches. However, grounded theory was originally constructed and was adopted as a research method to investigate practices in hospitals dealing with the terminally ill in the field of health in Glaser and Strauss' book *Awareness of Dying* (1965). In their book, the first to apply procedures of grounded theory, they set out to understand the real life experiences of those involved in dying process: the patient, relatives and care workers such as doctors and nurses. Their field work consisted of visiting six hospitals, interviewing participants and sitting in on meetings with care workers. Procedures of coding and the process of forming thematic categories in the study would be the basis of grounded theory, demonstrating its approach of grounding the data to the real lives of the participants.

Since it is seen as being compatible with qualitative research, grounded theory has been used in many research areas (Hood, 2007). For example, educational research is one of the areas where grounded theory has been suitably applied in the past few decades (Chong & Yeo, 2015), because it has adopted a holistic approach to the issues the researcher wants to address (Laws & McLeod, 2004).

The appearance of grounded theory in EFL (English as a Foreign Language) research studies in Japan can be seen in two particularly highly cited articles that have referenced it as a method they used in their research (i.e., Sakui, 2004; Sato & Kleinsasser, 2004). Although

the stated use of grounded theory in those widely referenced articles suggest its growing recognition in Japan, understanding of what constitutes grounded theory appears to have not kept pace with its increasing popularity. For example, Sakui basically uses interviews and Sato and Kleinsasser add observations. However, a transparent description of the researchers' respective roles regarding their distinctive use of grounded theory in data collection and analysis such as coding and thematic construction are not given. Thus, grounded theory seems to have become a synonym for the analysis and interpretation of data collected through interviews and observations. This point was elaborated on by Hood (2007), stating that some scholars use grounded theory to justify their engagement in qualitative data analysis or coding, while others simply consider grounded theory to be an inductive theory constructing method.

On the contrary, grounded theory is much more rigorous with triangulated procedures for collecting and analyzing data, and shallow interpretations only lead to misuses and overgeneralizations of its applications in research (Hood, 2007). Moreover, as grounded theory has become more known to researchers and used in different ways to address research inquiries, it has evolved (Bryant & Charmaz, 2007). For example, since the term "grounded theory" was introduced by Glaser and Strauss in 1967, it has developed in diverse directions with different versions of grounded theory (Cho & Lee, 2014). However, several studies (e.g., Kim, 2008; Miyazoe & Anderson 2010; Tajzad & Ostovar-Namaghi, 2014) just quoted its original book or from one of several editions of a seminal book without talking about the specific procedures they adopted and the role of the researcher in their studies. This is pointed out by Cutcliffe (2004), who claims that many researchers appear to quote a mixture of aspects from each version of grounded theory without taking their inherent incompatibilities into consideration.

To further illustrate this, in the study by Miyazoe and Anderson (2010), they just quoted some seminal books such as Glaser and Strauss (1967), Strauss and Corbin (1990), and Charmaz (2006) without specifying which version of grounded theory they adopted for collection and analysis of data. It would seem to be general knowledge that it is imperative for the researcher to be transparent about the methods used in the research. Thus, researchers have the obligation to specify which version of grounded theory they have utilized and justify why its version has been the most appropriate and effective method for their studies.

If there are differing versions of grounded theory, how would the researcher go about selecting the appropriate version of grounded theory? What constitutes an ontological, epistemological, and methodological framework for grounded theory study? What are the fundamental principals that weave through all the versions of grounded theory? What are the similarities and difference among its different variations? These are addressed in the following.

### **Grounded Theory and Its Evolution**

In this segment of the paper, I will talk about characteristics of grounded theory in the following six areas:

- 1) Background and Theoretical Foundations,
- 2) Unique Characteristics,
- 3) Goals and Rationale,
- 4) Prelude to Analysis,
- 5) Data Analysis Process,
- 6) Criteria for Evaluation

#### **1) Background and Theoretical Foundations**

As stated, the term “grounded theory” was introduced in the book entitled *The Discovery of Grounded Theory* by Glaser and Strauss (1967). They define grounded theory as “a general method of comparative analysis” (p. 1), and they argue that its purpose is to generate theory in social research from data that are rigorously analyzed into conceptualized categories. They add that this inductive way of theory generation is contrasted with positivist approaches in research that apply logical deduction from previously formed assumptions or hypotheses. However, as grounded theory evolved, the two founders began to take different approaches to grounded theory (Kelle, 2005, 2007). Glaser continued to take an objectivist approach, rejecting the adoption of preconceived notions before analyzing data, whereas Strauss gradually started to take a more pragmatic and interpretive approach, allowing prior theoretical knowledge to play a role in the process of interpreting data (Devadas, Silong, & Ismail, 2011).

As Glaser and Strauss took their own paths, their different perception on whether grounded theory is a methodology or a method became apparent (Cho & Lee, 2014). As mentioned above, Glaser and Strauss (1967) define grounded theory as a method, but Strauss seemed to change how he perceived what grounded theory is. Strauss along with Corbin (1990) first define grounded theory as “a qualitative research method that uses a systematized set of procedures to develop and inductively derive grounded theory about a phenomenon” (p. 24), but later on in their latest book entitled *Basics of Qualitative Research*, Corbin and Strauss (2015) broaden their definition. They (2015) define grounded theory as “a qualitative methodology that aims at constructing a theory from data” (p. 15). At first viewing, Strauss along with Corbin appeared to provide conflicting views on whether grounded theory is a methodology or method; however, they did not. Reichertz (2007) argues that although a set of procedures such as coding is an essential part of grounded theory, Strauss and Corbin never wanted grounded theory to be just confined in a coding paradigm. Grounded theory requires not only the method of coding but also the methodological perspective of developing and redeveloping concepts while repeatedly collecting and analyzing data. Therefore, although in their later work they defined grounded theory as methodology, they also seem to have considered it to be a method for constructing

theory from data by coding. That is, they saw grounded theory as providing a broad research framework with a theoretical perspective, which encompasses systematic procedures that adhere to its logic. Simply put, this view underpins the above claim by Corbin and Strauss that both procedures in grounded theory provide a complementary method under the larger umbrella of methodology for qualitative research.

Moreover, the Grounded Theory Institute under Glaser (2014), provides the following expansive definition:

Grounded Theory is an inductive methodology. Although many call Grounded Theory as a qualitative method, it is not. It is a general method. It is the systematic generation of theory from systematic research...Grounded Theory [as a general method] can be used with either qualitative or quantitative data. (Grounded Theory Institute, 2014)

Glaser's assumption that grounded theory itself is a methodology as well as expansively describing it as a "general method" having systematic procedures juxtaposes with Corbin and Strauss's (2015). However, the waters get a bit murkier with Glaser's definition of grounded theory positing that it has a characteristic of a general method, and therefore not solely a qualitative method. This view goes against the position of Corbin and Strauss (2015).

Charmaz (2014), the founder of constructivist grounded theory, seems to have taken the position of both Corbin and Strauss (1990, 2015) that grounded theory is a method within a qualitative methodology. Moreover, in drawing a particular distinction to Glaser's objectivist view (see below), Charmaz further expands the constructive role of the researcher in grounded theory in her definition describing it as:

A rigorous method of conducting research in which researchers construct conceptual frameworks or theories through building inductive theoretical analyses from data and subsequently checking their theoretical interpretations. Thus, researchers' analytic categories are directly "grounded" in the data. (p. 344)

The above description of grounded theory as a method stresses an important role researchers play in inductively constructing conceptual theories.

The role of the researcher in the interpretation of data offer insights into the variations of grounded theory. It is important to note that they vary according to the above researchers' philosophical perspectives on grounded theory, which can be classified into three different paradigms: positivism, post-positivism, and constructivism. Kahn (2014) writes that Glaser's position aligns itself with traditional positivism, stating the existence of an external reality, stressing objectivism in which a neutral observer separated from the data makes a discovery in an objective way and simplifies complex data to the point of minimizing it. Thus, it can be argued that objectivist grounded theory is represented by Glaser. According to Hildenbrand (2007), objectivist grounded theory takes an ontological position in which evidence of truth can be found in data that exist in the external reality, and researchers find the evidence depicted in the data and then discover and conceptualize theory from them. Moreover, to prevent the

discovery of truth from being subjected to biases, objectivist grounded theorists keep themselves distinctively distant from research participants and their realities. In so doing, objectivists try to analyze the data refraining from subjective analysis and not taking an interpretative stance. Thus, the ontological view of Glaser is that data represent objective facts about the world.

By investigating how Strauss and Corbin's ontological views progress, Charmaz (2014) argues that Strauss and Corbin's (1990, 1998) ontological perspective follows Glaser's view that an objective external reality exists because they believe that meaning is inherent in data and the researcher discovers it. However, they propose a set of technical procedures and espousing verification that can make it possible to collect data with acknowledging the subjective role of the researcher. Their assumption of grounded theory fits within the post-positivistic paradigm because they allow for the researcher's subjective views entering into the analysis. They also recognize that the participant's view must be accurately and rigorously recorded while the researcher's own interpretations of the data must also be accounted for during the coding procedures. In other words, they move along the spectrum from the positivist stance of objectivity and Glaser's position toward subjectivity, and they argue for the subjective and constructive role of the researcher as an interpreter of the data that must be acknowledged. This progression of Strauss along with Corbin from the positivist stance to the post-positivist to the constructivist stance was also noted in Devadas, Silong and Ismail (2011).

Corbin and Strauss's view of the constructive role of the researcher in data analysis continued to grow. While Strauss and Corbin's (1990, 1998) first and second editions of *Basics of Qualitative Research* can be seen as representing post-positivist grounded theory, the third edition of the book (2008) moved away from post-positivism toward constructivism. By the latest edition of their book (2015), they closely aligned themselves with constructivism and the subjective and interactive role of the researcher claiming. It should be noted that before the 2015 edition of the book was published, Strauss passed away and in Corbin's additions to the text, she used "I" in the following:

I agree with the constructivist viewpoint that concepts and theories are constructed by researchers out of stories that are constructed by research participants who are trying to explain and make sense out of their experiences and lives, both to the researcher and themselves. (p. 26)

Thus, the statement above seems to move closer along the spectrum toward a paradigm that is in line with constructivism, which is a far cry from Glaser's position. Ironically, constructivist grounded theory is founded on the work of Charmaz, a student of Glaser. In her seminal book, *Constructing grounded theory* (2014), she advocates the subjective and participatory role of the researcher in grounded theory studies to construct meaning from interpretations. The researcher and participants construct meanings of social processes in specific contexts, and its theory depends on the researcher's views. The constructivist views of facts depend on values, and constructivist grounded theorists take a reflective stance in the process of analyzing data,



which cannot exist outside of the views of the researcher. Like Corbin and Strauss, she believes the researchers subjective participation in a study needs to be accounted for and acknowledged. Thus, multiple realities exist, and facts are co-constructed by the interactions that take place between the researchers and their participants.

## 2) Unique Characteristics

Two of the characteristics of grounded theory are constant comparative analysis and theoretical sampling (Glaser & Strauss, 1967). Theoretical sampling is a key aspect of grounded theory and its logic distinguishes grounded theory from other types of qualitative inquiry. Glaser and Strauss (1967) define theoretical sampling as follows:

Theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyzes his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges. (p.45)

Corbin and Strauss (2015) elaborate on the concept, stating that its purpose is to collect data that allows the researcher to fully develop concepts, discover their variations, and clarify relationships between these concepts. According to Hood (2007), it is a method of data collection that makes grounded theory very unique. This strategy is distinct from representational sampling in quantitative research; theoretical sampling means taking steps to seek new areas to collect data so that the data analysis and category formation can be further enhanced.

Quantitative researchers use statistical data to test a fixed or pre-determined hypothesis about target populations in their research, whereas grounded theorists use a wider more pliant lens to expand on data collection samples in order to conclude whether emerging theories can be substantiated from the data (Glaser & Strauss, 1967). Charmaz (2014) explains the functions of theoretical sampling by stating that the flexible process of theoretical sampling enables researchers to substantiate possible theories by going beyond the boundaries of a preconceived or fixed experimental framework where it is very difficult to explain emerging and complicated data that do not lie within its realm. Theoretical sampling also allows researchers to construct robust categories and make relationships among these categories clear as they emerge during the analysis of data. Thus, theoretical sampling is conducive to the inductive theory generating process.

In shedding light on a difference between quantitative positivistic approaches to research that adhere to a pre-determined, deductive and hypothesis testing framework and the unique process approach to grounded theory that allows theories to emerge, a different stance of the researcher becomes clear. For example, Charmaz (2014, 2015) advises researchers to analyze the data with an open mind. The point being made here is not to be judgmental or myopic when analyzing data. For example, in constructivist grounded theory, the openness of theoretical sampling can involve a form of reasoning called “abduction,” which makes grounded theory unique. Abduction is defined as:

A type of reasoning that begins by examining data and after scrutiny of these data, entertains all possible explanation for the observed data, and then forms a hypothesis to confirm or disconfirm until the researcher arrives at the most plausible interpretation of the observed data. (Bryant & Charmaz, 2007, p. 603)

Thus, in adopting this abductive reasoning, the researcher should not finalize the interpretation of data when new hypotheses might appear at an early stage. New codes, categories, and themes need to be developed and redeveloped until the saturation of data.

Plausibility in abduction offers an important and unique difference between grounded theory and positivist research frameworks. Abduction involves inductive thinking and the constructing of emergent and often surprising findings into a level of abstraction that extends the theoretical perspectives of the researcher to further richer conceptualizations of collected data, which can then lead to forming a plausible core theme (Bryant & Charmaz, 2007). In contrast to the constructing nature of abduction is specification, which involves a form of reductionism, deconstructing ideas of a general theory or concept into facts that can provide evidence to prove a predetermined hypothesis (Golafshani, 2003). Thus, the former operates in a bottom-up manner and the latter a top-down one.

The flexible traits in the form of theoretical sampling and abduction, for example, found in grounded theory allow researchers to consider all the possible theoretical interpretations of their data while keeping a critical, skeptical stance toward these theories. This concept concurs with theories earning their ways into data. A key point in the preceding comments is that rigor in grounded theory throughout the research process is important to further substantiate not only the data emerging from participants, but also the researcher's subjectivity in the study.

With regard to the definitions of grounded theory, one of the common characteristics among researchers, such as Glaser (1978), Strauss and Corbin (1990, 1998, 2015), and Charmaz (2014), is the construction of theory grounded in data. Corbin and Strauss (2015) explicates what makes theory different from description, arguing that theory goes beyond reporting factual details to forming abstractions leading to broader and richer conceptualizations to explain what is happening. According to Charmaz (2014), while theory and description begin with concepts in a similar way, leading to the construction of categories and a theme, theory has to have linkages made between the categories to each other and to a more abstract concept with an explanation of why and how something happens. Thus, no matter what versions of grounded theory the researcher utilizes, the construction of theory is a core principle among them.

### **3) Goals and Rationale**

Although the ultimate goal of grounded theory is the construction of theory, how theory is defined seems to be based on ontological and epistemological beliefs held by individual researchers. In other words, the definition of theory itself varies according to how researchers perceive their own reality and knowledge. The strength of positivism in research

has traditionally led to the most prototypical definitions of theory formation. Positivistic belief is based on the assumption of an existing objective and external world, generalization of theory, and causal explanations (Golafshani, 2003). Bryant and Charmaz (2007) state that Glaser assumes that it is possible to discover, explore, and understand reality. Based on this assumption, he seems to believe that unilateral and knowable reality is to be discovered. Thus, it can be argued that the positivist definition of theory is partly aligned with Glaser's insistence on the relationship with emergence and objectivity by the researcher in grounded theory. Several scholars (e.g., Devadas, Silong & Ismail, 2011; Kelle, 2005, 2010) consider Glaser's version of grounded theory to be objectivist grounded theory.

Charmaz (2014) contrasts positivism with pragmatism, an alternative definition of theory which is driven from an assumption that there are multiple realities, emphasizing interpretation. According to Star (2007), pragmatists believe that theoretical understanding is attained through the theorist's interpretation of the phenomenon studied. Their perception is that people always interpret events from many situated perspectives. Thus, interpretative theories, in contrast of positivistic theories, acknowledge the messiness of reality, the uncertainty of the outcome rather than a linear causality between variables.

Based on the relationship seen between pragmatism and interpretive theories, Charmaz (2014) juxtaposes pragmatism with interpretative theoretical foundation. Interpretive theorists set out to construe their participants' meanings and actions. This theoretical approach takes an ontological position that accentuates practices and actions with aforementioned multiple realities rather than a single fixed reality. Hildenbrand (2007) also aligns interpretive theories with constructivist grounded theory. Therefore, the constructivist variation of grounded theory can be seen as having epistemological underpinnings commonly seen in pragmatic and interpretive approaches.

#### 4) Prelude to Analysis

As this review is indicating, there are distinctively different approaches the researcher can take with grounded theory, and these reflect the differences between Glaser on the one hand, and Corbin and Strauss and Charmaz on the other. For example, researchers are more likely to construct research questions at the early stage of a study. However, Glaser (1992, 1998, 2012) rejects the construction of a research question at the outset of the study because he is very concerned that the reduction of factors might prevent total emergence. Therefore, he advocates the importance of a clean slate or *tabula rasa* in the process of approaching a research problem (this is also true for the case of writing a literature review mentioned below). In contrast, Corbin and Strauss (2008, 2015) and Charmaz (2014) accept the construction of research questions in their usual role in traditional research to guide the inquiries of the study.

Glaser (1992, 1998), Corbin and Strauss (2008, 2015), and Charmaz (2014) recognize the role of literature review in developing theory, but the difference falls on when the literature

is utilized. At first, in *Discovery of Grounded Theory*, Strauss agrees with Glaser (1967) and objects to the idea of the use of literature at the beginning of the research in order to avoid the possibility of forcing the researcher's preconceptions on data that again might interfere with emergence. They suggest comparing an emerging theory with the literature at a later stage when the substantive theory grounded in data is beginning to emerge. Their perspective is that theoretical concepts should purely emerge from data as long as researchers approach their data with having no preconceived theories or hypotheses. As these concepts emerge, they are then shaped into conceptualizations through what Glaser and Strauss (1967) call "theoretical sensitivity" to indicate the researcher's ability to see relevant data to the research inquiry. They simply touched on the concept by just stating that a researcher's theoretical sensitivity fosters the construction of categories and hypotheses, eventually leading to substantive and formal theories. Thus, their argument is that theoretical sensitivity allows the researcher to construct theories emerging from data. Even though Glaser and Strauss (1967) introduce the concept of theoretical sensitivity in grounded theory to the world, they are vague about the concept and never attempt to define what theoretical sensitivity actually is. Later, Charmaz (2014) defines theoretical sensitivity as follows:

Theoretical sensitivity is the ability to understand and define phenomena in abstract terms and to demonstrate abstract relationships between studied phenomena. With this type of sensitivity, grounded theorists discern meanings in their emergent patterns and define the distinctive properties of their constructed categories concerning these patterns. (p. 161)

Thus, theoretical sensitivity enables the researcher to begin to take an assertive role and detect emergent concepts leading to the construction of categories and themes. Ideally, theoretical sensitivity forms the process using one's capabilities informed by experiences and knowledge to make attempts to see possibilities and make connections.

Theoretically speaking, it appears that theoretical sensitivity makes sense; however, several authors such as Kelle (2015) question the concept in a practical sense. For example, how can the researcher enter into a research situation unbiased without having preconceived theoretical knowledge? Or how could a researcher (especially a postgraduate student) who does not have deep knowledge of the field being researched be expected to have the depth of knowledge and experience necessary to acquire such a high level of theoretical sensitivity? In short, expectations of the researcher having theoretical sensitivity as described above would seem to be unrealistic.

Strauss' views on the researcher's role regarding theoretical sensitivity evolved over the years since he co-authored with Glaser in 1967. In writing with Corbin (1990), he points out, as Kelle (2015) above has argued, that researchers already have a great deal of background knowledge cumulated from professional and disciplinary literature. In Strauss and Corbin's 2008 edition, they also readdress the view held in Glaser and Strauss (1967) that the literature review should not be conducted at the beginning of a study so as not to pre-determine category

formation by claiming that a literature review can be done at any stage of the research. Then, in their final edition, Corbin and Strauss (2015) continue to claim the literature should be used to enhance analysis, not constrain it, which further argues against Glaser's position (2012) of still maintaining an objective stance by insisting that grounded theory should be kept from being contaminated by preconceived ideas.

In consideration of quantity regarding data collection that comes before its analysis, one of the important issues for researchers to consider is how many interviews will suffice for their study. A fundamental principal of grounded theory which is noted in both Charmaz (2014) and Glaser (2012) is that a small scaled sample size does not necessarily reduce the quality of data, depending on the length of talks and opportunities to be re-interviewed.

In response to the question: how many interviews or observations are enough and when can the researcher stop collecting data, Corbin and Strauss (2015) discuss several different kinds of constraints such as time, energy, subjects and data collection processes, providing no unambiguous answers to the question. They just conclude that the researcher needs to be aware that putting an end to data collection before theoretical saturation occurs will likely produce thematic categories lacking in robustness and offering thin depictions of findings. When researchers reach the phase of theoretical saturation, in which there is a substantial amount of data to support a category, it is highly likely that they will not be able to discover new properties of a theoretical category and generate any further insightful theoretical findings. However, it can be very difficult to know when theoretical saturation takes place in a practical sense.

Charmaz (2014) never specifies how many interviews are necessary for grounded theory studies. She simply states that researchers can decide the number of interviews according to the analytic level of their studies and their purposes. She also states that a larger number of single interviews can occur and are often consistent with grounded theory studies. However, what is important to her seems to be how to maximize access to data. She emphasizes the importance of maximizing access by arguing that having more access to longitudinal data taken from a single individual participant provides a richer database that gives researchers an opportunity to compare data provided by him or her at multiple points in time.

Thus, it appears that the number of interviews depends on what kinds of studies are conducted and how long studies continue in order to follow their goals. It can be argued that as long as researchers have enough data that allow them to pursue their research questions and solve them in their studies, a small number of interviews might be sufficient to achieve theoretical saturation.

## 5) Data Analysis Process

The above has indicated that data analysis in grounded theory is an inductive process that is constructed in a bottom-up manner. Bryant and Charmaz (2007) argue that data analysis

entails a coding process that involves a conceptualization process that is intricately woven from comparative analysis of the data of labeling and drawing relationships among coded text into substantiated categories, which are linked to broader abstractions that eventually form the construction of a general theory or theories. Corbin and Strauss (2015) define coding as a way to find concepts by interpreting what is behind data. Charmaz (2014) argues that coding connects data collection to the development of an emergent theory, and due to coding, the researcher can specify properties and characteristics of data and interpret what these data indicate. According to Cho and Lee (2014), what distinguishes the data analysis of grounded theory from other types of qualitative analysis is that data is coded immediately after it is collected, with the next data collection following based on the discoveries in the previous data analysis, and its procedure has nonlinear sequence. In this way, data collection and analysis of these data simultaneously occur. In the process of data analysis, researchers compare and contrast incidents that consistently occur in each category, putting similar categories together according to their properties. Then, they explore the possibilities of theory generation and write a theory.

A list showing the development of various types of grounded theory according to the four main researchers' positions along with their different versions of coding processes are presented in Table 1. In the table, the first two columns are taken from Cho and Lee (2014, p.15) and the last column, showing researchers' assumed roles when implementing a variation are from the author.

*Table 1 Different Versions of Coding Processes*

Researchers	Coding processes	Roles of the researcher
Glaser, 1978; 1992	<ul style="list-style-type: none"> <li>• Substantive coding</li> <li>• Theoretical coding</li> </ul>	The researcher discovers theories from data without any preconceived notions
Corbin & Strauss, 1990	<ul style="list-style-type: none"> <li>• Open coding</li> <li>• Axial coding</li> <li>• Selective coding</li> </ul>	The researcher discovers theories from data with acknowledging existence of subjectivity
Charmaz, 2015	<ul style="list-style-type: none"> <li>• Initial coding (word-by-word, line-by-line, and incident with incident)</li> <li>• Focused coding</li> <li>• Theoretical coding</li> </ul>	The researcher constructs categories and theories through an interaction with data

In the above, a major difference as discussed is the degree of subjectivity and participatory role of the researcher in the study. Unlike the other three researchers, Glaser uses a two stage coding process. Substantive codes are developed during the initial stage of the coding process called open coding. These codes might include participants' words or phrases called "in vivo codes"

or some ideas derived from sociological constructs. Theoretical codes are utilized to establish links between substantive codes, which allows analysts to understand how these codes cluster together in an interrelated process to construct a theory (Glaser, 1978, 1992). Thus, theoretical codes describe possible links between various substantive codes and help to create theories (Kelle, 2010). However, it is important to remind the reader that the inductive process of theory construction is an interwoven process. For example, Hernandez (2016) argues that substantive and theoretical coding are not mutually exclusive processes. It is likely that these two types of coding occur at the same time to some degree. In order to describe how these two types of coding take place simultaneously, she cites a part from Glaser's (1978) *Theoretical Sensitivity*, in which she points out that researcher moves back and forth between these two types of coding as a part of the comparative analysis process. The researcher is more likely to use substantive coding than theoretical coding in order to discover codes within data and later in the process of coding, they will switch the coding procedures so that they could integrate their memos into theory constructions. As mentioned above, this is not a linear mutually exclusive process.

In the book entitled *Qualitative Analysis for Social Sciences*, Strauss (1987) introduces a more straightforward and less complicated way of analyzing data called "coding paradigm." The analysis starts with open coding for the purpose of producing concepts that appear to fit the data by closely examining field notes, interviews, and documents. This can be done line by line or word by word. It entails searching for guiding items that can be utilized either explicitly or implicitly to organize the data and to make relations between codes clearer.

Corbin and Strauss (1990), in trying to make grounded theory procedures more transparent and systematic, suggest, as shown in Table 1, three basic types of coding: open coding, axial coding, and selective coding. Open coding is the initial stage of data collection and analysis where the researcher analytically de-constructs and interprets data. The purpose of this stage is to provide the researcher with new insights that are distinct from traditional ways to interpret social phenomena in data. In open coding, the researcher compares and contrasts events, actions, or interactions with others in order to find some similarities and differences. This open coding stage makes it possible to come up with conceptual labels and conceptually cluster them together to form categories and subcategories, which later become the basis for constructing theories. This type of bottom-up coding process enables researchers to become aware of their own subjectivity and bias.

The next stage, axial coding, is where labels from open coding through comparative analysis are merged into broader conceptual categories to allow the researcher to form abstractions from the data leading to the formation of a general theory(ies). Corbin and Strauss (1990) explain axial coding as follows:

In axial coding, categories are related to their subcategories, and the relationships tested against data. Also, further development of categories takes place and one continues to look for indications of them. (p.13)

Thus, axial coding is utilized to identify relationships among categories and between categories and their subcategories. Charmaz (2014) defines axial coding in a more focused way than Corbin and Strauss. In coding, one main category exists as an axis and the axis is surrounded by subcategories. The analyst's role is to describe their relations with the axis and detail the category's dimensions or properties. The conceptualized axial coding categories make it possible to put data fractured by open coding back together. The analyst simply applies this coding procedure to analyze and form conceptualizations of the emergent data from open coding. Axial coding leading to conceptualizations of categories plays an important intermediary role in theory building.

Selective coding is more likely to occur at the later phases of a study because it focuses directly on the process of theory formation. Corbin and Strauss (1990) depict it as finding a 'core' category that unifies all categories around it and describing what these categories are in a very detailed oriented way. One of the things the analyst needs to do is to name the core category. It can be named from among the categories identified or an abstract term may be used to describe the core category. Regardless of the naming of the core theme, it needs to be an umbrella term to encapsulate concepts and categories developed by open and axial coding.

Charmaz (2014) proposes (see Table 1) a different version of a three stage coding system: initial coding, focused coding, and theoretical coding. Initial coding is the early stage process in which the analyst engages in defining data. This coding leads data collected to the development of an emergent theory and its purpose is to account for these data. Initial coding encompasses three different types of coding practices: word-by-word, line-by-line, and incident with incident. Charmaz (2014) reintroduces coding with using gerunds shown by Glaser (1978) at the initial coding stage, arguing that initial line-by-line coding with gerunds plays a very crucial role in placing researchers close to data, which allows them to engage with fragmented data. Coding with using gerunds helps researchers make implicit meaning and actions explicit, gain directions to follow, compare and contrast data, and become aware of emergent relations among concepts and categories.

Focused coding is a coding process that comes after initial coding in which the researcher closely examines codes that shows frequently among initially identified codes and check these codes against other codes (Charmaz, 2014). Theoretical coding comes after focus coding, and it is a more advanced level of coding that analyzes the codes selected at the previous phase. Theoretical coding that was originally introduced by Glaser (1978) allows researchers to use theoretical codes gained from prior theories and analytic schemes. This type of coding also allows researchers to integrate the categories detected during their analyses of data. Theoretical coding seems to be different from selective coding coined by Corbin and Strauss. However, according to Hernandez (2016), the eventual theoretical code that produces the substantive theory is revealed at the selective coding phase after the core category becomes apparent. Thus, again the terms get murky as it can be argued that the functions of theoretical coding seem to



be very similar to those of selective coding.

Charmaz (2014) believes that theoretical codes should give weight to substantive codes showing relations among them, and these substantive codes should not be replaced with codes that constitute the analyst's preconceived theory. She advises researchers to utilize theoretical codes because these codes will likely make their analysis clear and sharp, and she also advises researchers not to force their preconceived framework on the analysis of data. In this sense, Charmaz is consistent with Glaser because both scholars agree as she writes, "theoretical codes must earn their way into your grounded theory" (p. 153).

I have discussed different versions of coding processes so far. Four researchers mentioned above (i.e., Glaser, Straus, Corbin, and Charmaz) have different terminologies and their definitions for each segment for the coding process. There seems to be a theoretical difference over the coding processes (in addition to the researcher's role), which muddies the waters and makes it hard to differentiate one from the other in practice. However, the principle underlying these different versions of coding processes is that theory eventually generated in empirical studies should be grounded in codes the researcher inductively constructs based on data, and that the coding process is narrowed down to a selection of coding categories that will relationally be linked to each other and under the umbrella of a theoretical or core theme or themes to encapsulate the categories.

## **6) Criteria for Evaluation**

Issues concerning how grounded theory research is evaluated are significant and at the same time most controversial. This is especially so when those in academia gauge research solely from a positivist standpoint. Glaser and Strauss (1967) argue that evaluations of grounded theory studies should not be aligned with those of quantitative research and the use of terminologies for criteria in that research area are not necessarily appropriate. For example, they recommend credibility and applicability as more appropriate terms instead of reliability and validity, respectively, in which, according to Golafshani (2003), the latter two are more commonly used in quantitative research.

Charmaz (2014) also discusses criteria to evaluate grounded theory studies in the book and suggests the following criteria: credibility, originality, resonance, and usefulness. She posits that if the researcher brings originality and credibility to the study, then the outcomes will resonate or ring true, providing theoretical and practical understandings and applications of the phenomenon under investigation. What is in common among these criteria suggested by those scholars above is applicability. This provides an opportunity for practitioners to use grounded theory methodology and procedures in order to address problems that arise in practice. Thus, uses of the different terminology such as credibility, plausibility, resonance and practicality free researchers from the confines or limitations of those who might evaluate grounded theory research based on viewing the studies from the lens of concepts associated with quantitative

methods.

The above show there are differing versions of grounded theory underpinned by differently held assumptions of how it should be carried out and evaluated. However, the focus should not be on which of these versions is the correct one, but it should be on which of these approaches to grounded theory will fit what the researchers want to do in their study.

### **Selecting the Appropriate Version of Grounded Theory**

The discussion above pointed out the differing versions of grounded theory and why they exist. It is important to note that a salient factor to establish the selection of an appropriate version relative to this article depends on the researcher's role. From among the different versions of grounded theory, I adopted the constructivist grounded theory approach proposed by Charmaz (2008, 2014) to my study. This approach was consistent with my participatory role in the research as a reflective co-creator of meaning with my teacher participants in a specific context. As compared to other versions of grounded theory mentioned above, especially Glaser's that attempts to minimize the subjective role of the researcher during the data analysis, constructivist grounded theory allows the researcher to play a more interactive, co-constructed role with the participants.

According to Charmaz (2008, 2014), constructivist grounded theory provides researchers with a pliable tool that enables them to tolerate the messiness in doing social research, which assumes multiple social realities that are generated in an ongoing or longitudinal process. Clarke (2015), who promotes grounded theorizing while using situational analysis, also argues that researchers need to accept heterogeneous realities, which allows them to take postmodernist perspectives into consideration. Charmaz (2008) also carves out a more substantial role for researchers by noting how important it is to incorporate what researchers carry around with themselves such as their values and beliefs, their previous experiences, their social positions and privileges, their own perspectives, and their interactions with the participants in the study. Thus, it can be argued that constructivist grounded theory acknowledges subjectivity and the researcher's involvement of the interpretation of data and construction of theory. This version of grounded theory agrees with my participatory role as a researcher, acknowledging my subjective perspectives in my study.

Charmaz (2008, 2014) argues that reality in a specific situation is constructed in the process of the interaction that takes place between the researcher and the research participant; therefore, both of them are co-creators of the reality. The importance of a situation also needs to be recognized in constructed grounded theory. In this regard, situational analysis is gaining attention in interdisciplinary fields. Clarke and Friese (2008) claim that situatedness of an interaction should be accounted for in qualitative research and in grounded theory. They also argue that it is necessary to specify the conditional elements of a situation because they

constitute the situation, not simply surrounding it or framing it by the broader parameters of context. This perhaps more realistic or pragmatic approach to social research enables the researcher and the research participant to co-construct theory from the data embedded in the particular situation. As stated, because my role as a researcher in this study is participatory as a participant observer, reflective practitioner, and co-constructive agent, my position as a researcher can be aligned with this constructivist approach focusing on a particular situation. My subjectivity in this situation can be not only explicitly acknowledged but also used as a source of knowledge, and my experience itself can be treated as data. Therefore, the constructed grounded theory version is appropriate for my study.

### Conclusion

This case study exemplifies an appropriate version of grounded theory taken to fit the research that I was undertaking. In the article, it was shown how the constructivist variation is the appropriate one and why the others are not. By showing the full spectrum from Glaser, Strauss and Corbin, and Charmaz, this article indicates that varying versions of grounded theory proposed by these scholars differ according to their ontological, epistemological, and methodological perspectives. Glaser has a positivistic approach to grounded theory with an assumption of the researcher's objectivity. He believes that the researcher's bias should be treated just as a variable, and he takes a position of *tabula rasa* when coding data. After Strauss takes his own path after he co-authored with Glaser (1967), he develops his own version of grounded theory with Corbin, which is considered to be post-positivistic. In Strauss and Corbin's (1990, 1998) version of grounded theory, even though they acknowledge the existence of subjective ideas of the researcher, the purpose of their use of grounded theory is to make a discovery of theories that exist apart from the researcher. As Strauss and Corbin's version of grounded theory (Corbin & Strauss, 2008, 2015) develop as a research method as well as methodology, it starts to take a relativistic ontology and subjective epistemology.

Charmaz (2014) outlines constructivist grounded theory and contrasts it with Glaser's and Strauss and Corbin's version of grounded theory. In constructivist grounded theory, the researcher constructs categories and theories by interacting with data. The researcher's previous theoretical knowledge should be subjected to rigorous scrutiny, being incorporated into coding data, and the researcher and participants of a study co-construct meaning in data.

Of these varying variations of grounded theory, my participatory role as a researcher in my study determined the selection of constructivist grounded theory as the most suited version. Constructivist grounded theory would allow me to play a more interactive and co-constructed role with my teacher participants in their teaching situations.

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## Unpacking Grounded Theory: Treading the Murky Waters (グラウンデッドセオリーの謎に迫る)

進藤 孝雄

ここ数十年の間、グラウンデッドセオリーは、日本の教育分野において、適切な研究方法の一つとして頻繁に使われるようになりました。もともとは、保健医療の分野で生まれたのですが、現在では、EFL (外国語としての英語) の分野で使用されるようになりました。グラウンデッドセオリーは最近多くの学者に知られるようになり、その過程において様々な種類のグラウンデッドセオリーが登場してきました。この論文ではまず、作者の事例研究に焦点を当て、なぜグラウンデッドセオリーが最適な研究方法なのかを議論していきます。その後、存在論的、認識論的、方法論的視点から、グラウンデッドセオリーがどのような特徴を持つものなのかを検証していきます。さらに、1967年にグラウンデッドセオリーが生まれて以降どのように進化を成し遂げてきたかを検証していきます。論文の終わりには、なぜ構成主義のグラウンデッドセオリーが作者の研究にもっとも最適なのか、その理由を検証していきます。