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UNIVERSITY OF ALBERTA  
INTERNATIONAL INSTITUTE  
FOR QUALITATIVE METHODOLOGY

# Verification Strategies

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*“uplifting the whole people”*

— HENRY MARSHALL TORY, FOUNDING PRESIDENT, 1908

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Morse, J. M., Barrett, M., Mayan, M., Olson, K., & Spiers, J. (2002). Verification strategies for establishing reliability and validity in qualitative research. *International Journal of Qualitative Methods* 1 (2), 13 – 22 (Article 2).

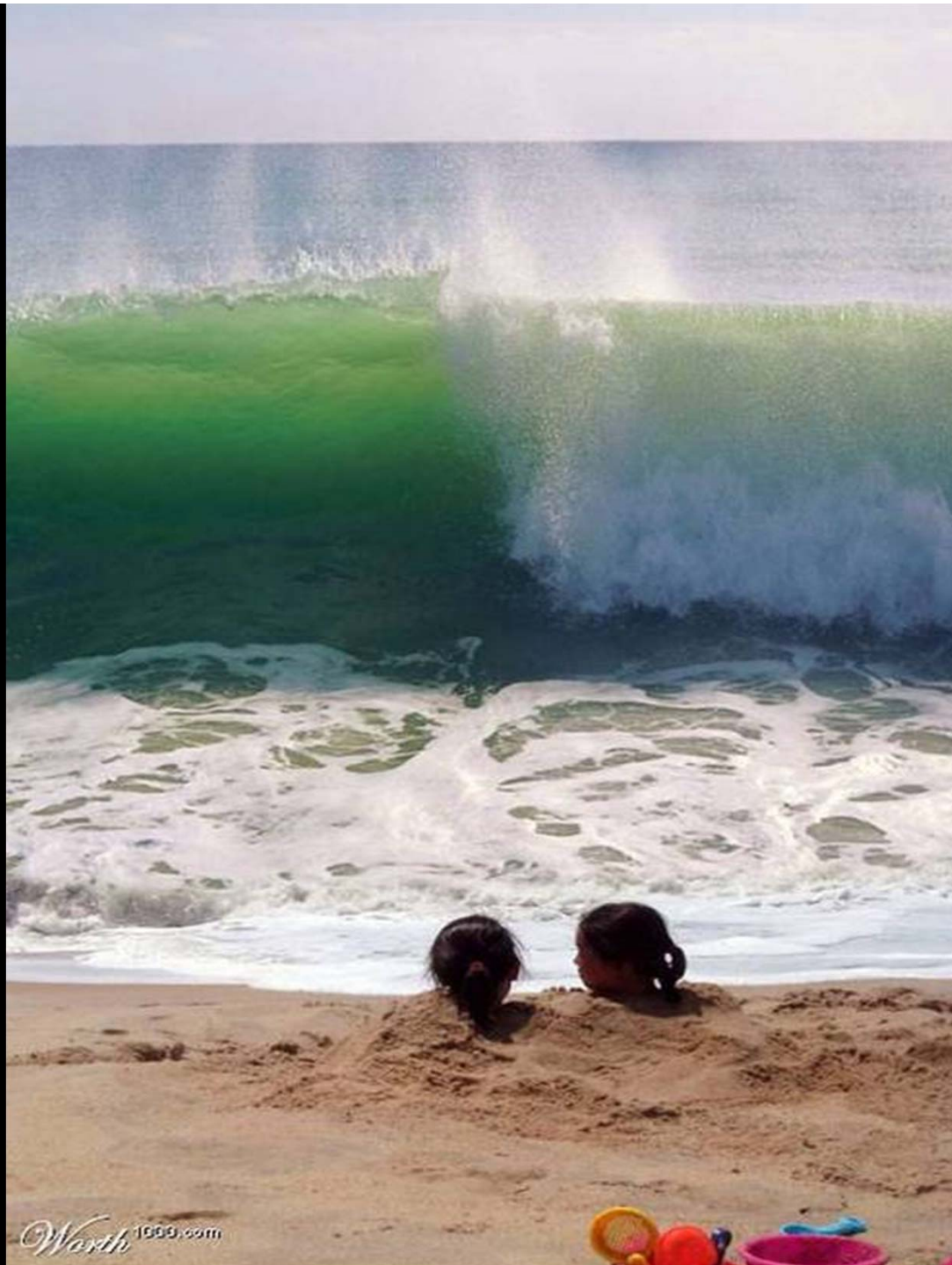
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# Agenda

- **The Problem**
- **Issues in Rigor**
  - What is it?
  - Guidelines versus orthodoxy
  - In process versus post hoc evaluation
  - Minimum standards or ideal gold standards?
- **Verification**
  - Characteristics and goals
  - Strategies







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# This thing we call rigor







“In the literature on reliability and validity, I find the terminology execrable! We have so many terms to cover the same concept. Nobody is talking to anybody. Anybody who does anything at all on reliability makes up a new term to cover what has previously been discussed in another field.”

(Brink, 1991, pg.. 163)



**Whatever validity is,  
I apparently 'have' or 'get'  
or 'satisfy' or 'demonstrate'  
or 'establish' it. . ."**

**(Wolcott, 1990, p. 121, cited in Morse et al., 2002 page 15).**

# Rigor

**Demonstrating integrity,  
competence, and legitimacy  
of the research process by using  
strategies that are inherent in the  
research process**



# Worrying Trends

- Shift from constructive (during the process) to post hoc evaluative standards
- Predetermined criteria as guidelines, orthodoxy or ideal standards
- Standards, goals and criteria regarded synonymously
- Consumer, reviewer or researcher responsibility?
- Standards external to the research process itself



- Back staging of strategies to ensure rigor during research in favor of criteria and standards for evaluation of overall significance, relevance, impact and utility of completed research
- Less focus on in-built strategies in research process that can act as a self-correcting mechanism.
- De-emphasize processes of verification to catch serious threats before it is too late to correct them

# **Verification Strategies**

**Strategies used during the process of inquiry – built into the inquiry process to actively ensure reliability and validity and thus rigor.**





**Verification is the  
process of  
checking,  
confirming,  
making sure, and  
being certain**

(Morse et al. 2002, pg. 9)

## Verification in Qualitative research

- Inbuilt mechanisms
- To identify and correct errors as you go
- To prevent errors before they are locked into the developing model and before they subvert the analysis.
- Reflect principles of qualitative inquiry
- Incremental and self correcting in iterative processes of qualitative research



## Iterative processes in qualitative research

- Always moving back and forth between design and implementation
- Checking congruence between question formulation, literature, recruitment, data collection strategies and analysis
- Systematically check data and fit of data
- Maintain focus
- Constant monitoring and confirming conceptual work of analysis and interpretation








There are things known and there are  
things unknown, and in between are  
the doors of perception...

~Aldous Huxley~




# Verification strategies

1. Methodological coherence
  2. Sampling sufficiency
  3. Developing a dynamic relationship between sampling, data collection and analysis
  4. Thinking theoretically
  5. Theory development
- 



# 1. Methodological Coherence

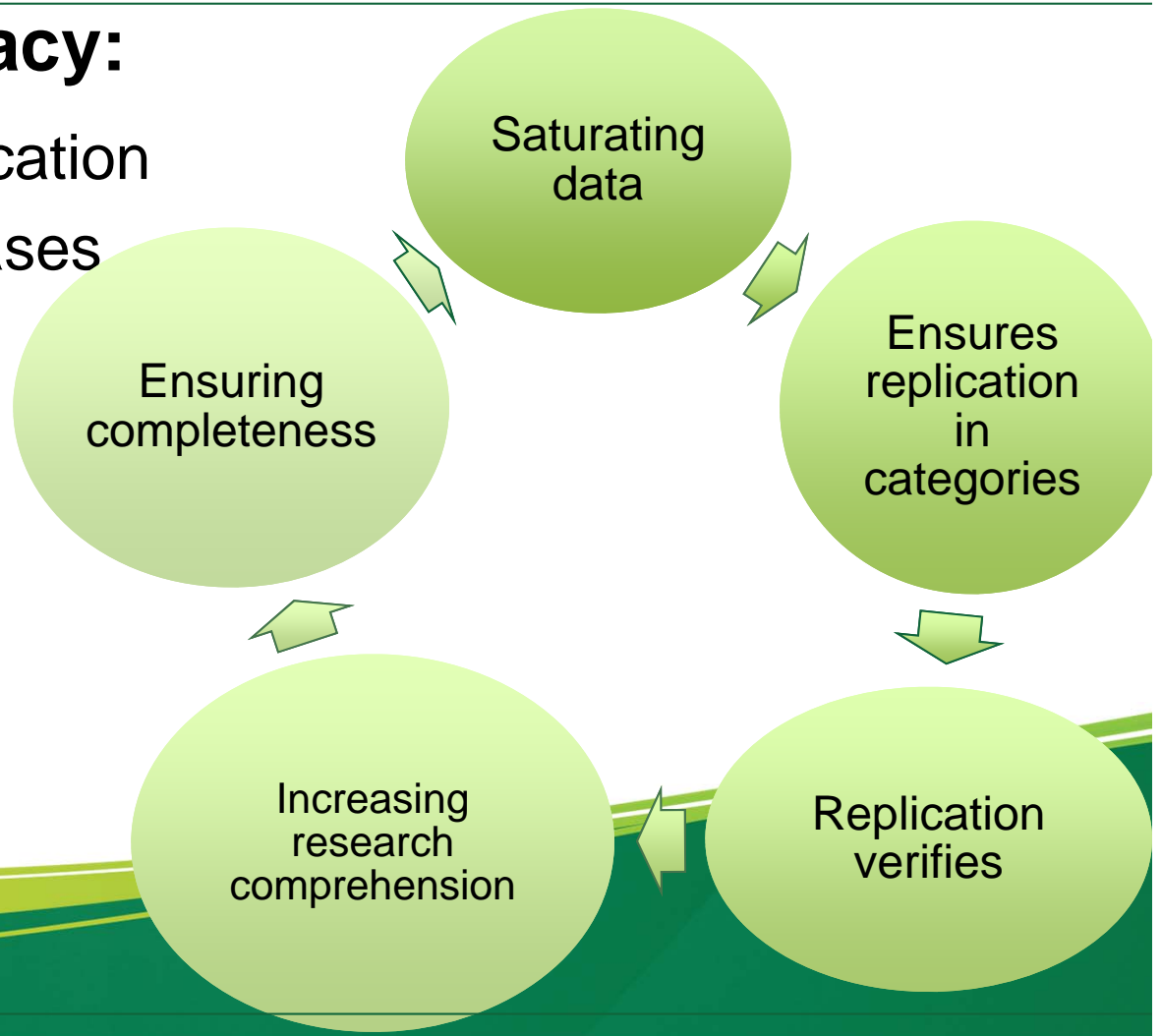
- Congruence between research question & components of the method
  - Adherence to assumptions & consequently to strategies within each method
  - Coherence between research components with data to meet analytic goals
  - Incrementally verifying previous components and the methodological assumptions as a whole.
- 

# 2. Sampling Sufficiency

- **Sample Appropriateness**

- **Sampling Adequacy:**

- Saturation and replication
- Seeking negative cases



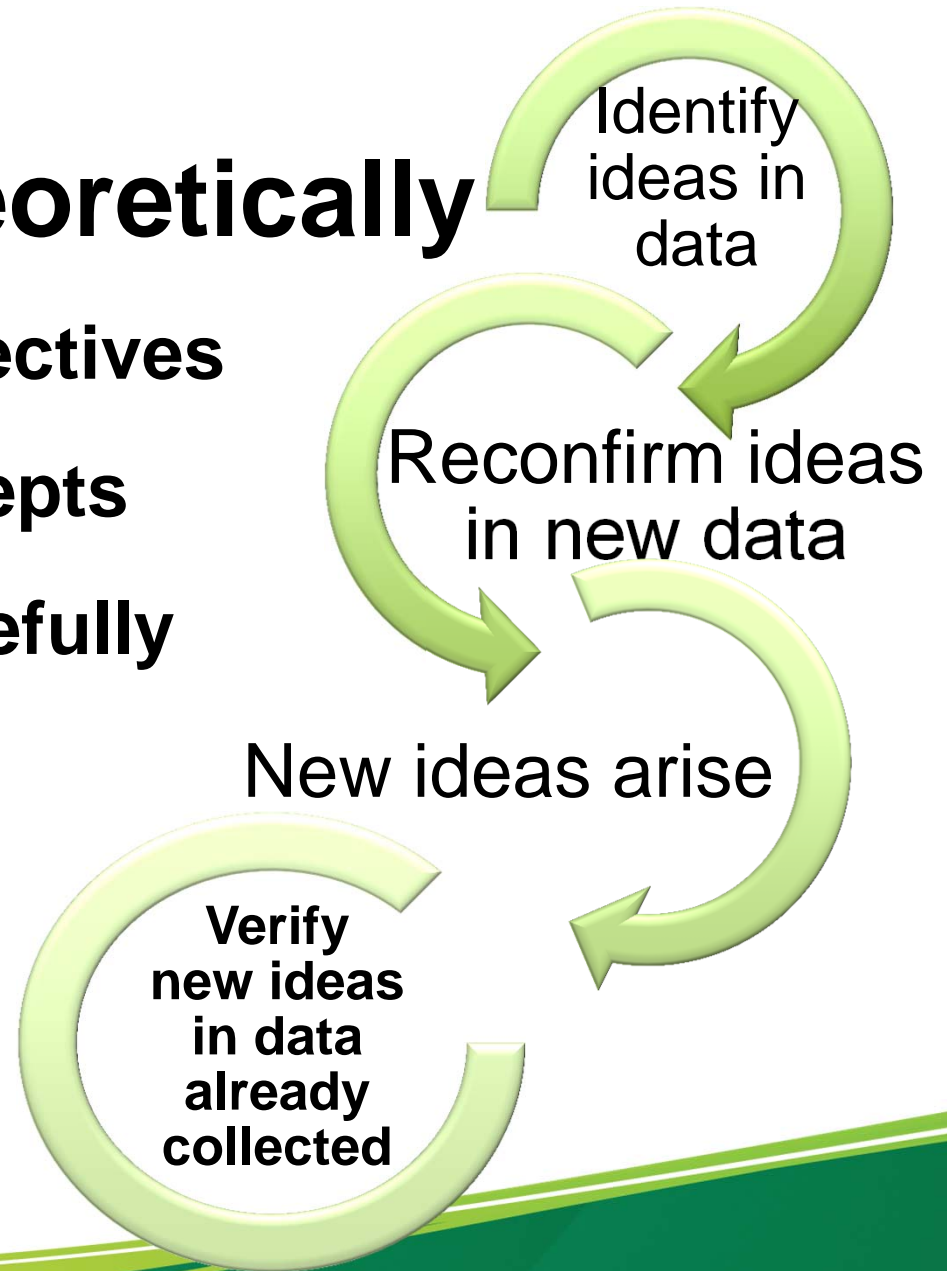
# **3. Sampling – Data Collection – Analysis Relationship**



Concurrent  
data  
collection  
& analysis

# 4. Thinking Theoretically

- **Macro-Micro Perspectives**
- **Thinking with concepts**
- **Using literature carefully**



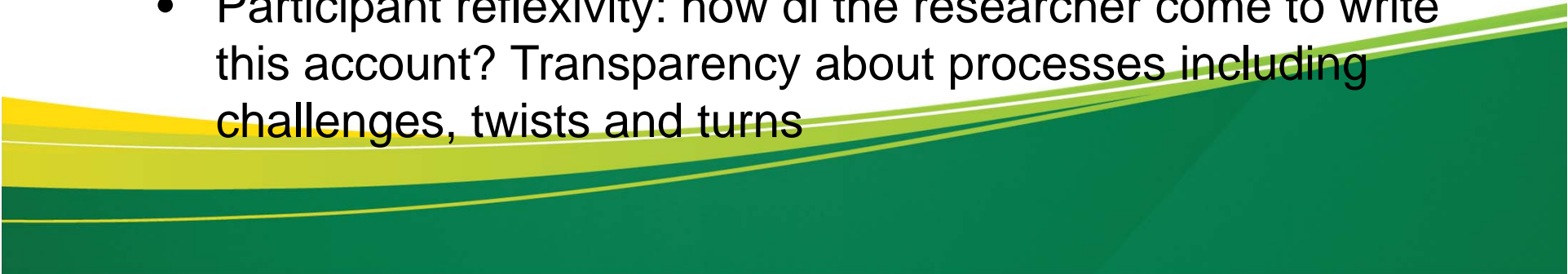


# 5. Theory Development

- Micro perspective of data & macro conceptual/theoretical understanding.
- Theory develops as an outcome of the research process rather than being adopted as a framework to move the analysis along
- Theory is used as a template for comparison and further development of the theory



# Other Strategies

- Prolonged engagement to avoid interpretations based on limited contact: getting beyond the public face to see routines, common occurrences and unusual events
  - Participant checks: verify developing interpretations, hunches, hypotheses with participants: Do they make sense or resonate?
  - Personal journals
  - Peer debriefing and review
  - Participant reflexivity: how did the researcher come to write this account? Transparency about processes including challenges, twists and turns
- 



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