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Looking back to move forward:

The value of reflexive journaling for novice researchers

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Abstract

For novice qualitative researchers, each encounter in the field yields a ream of questions and uncertainties. While fieldwork has inherent ambiguities for all researchers, novice researchers have less experience on which to draw to assess their interactions with participants. Adding to this uncertainty, gerontological fieldwork is frequently imbued by age-and cohort-related nuances, characteristics which new researchers often do not share with participants. It is also not uncommon for new researchers to work primarily alone on projects, such as dissertations and theses. Mentors and academic advisors can help examine research encounters, however advice may be most constructive following engagement in reflexive exercises. We discuss the benefits of using reflexive journaling to assist with answering the many questions generated while conducting qualitative interviews during a study with family carers. Advisors might consider encouraging the use of reflexive journaling to help novices grow as researchers.

While methods sections in peer-reviewed journal articles neatly describe how qualitative research is conducted, those new to qualitative methods are keenly aware of how much these sections omit. As a part of completing a master's-level dissertation, as a novice researcher KM dove headfirst into the "messy work" (Gunaratnam, 2003, pp. 104) involved in in-depth qualitative interviewing. Although given the tools to remain afloat—methods articles, a dissertation workshop, and an experienced advisor (RW)—reflexive journaling throughout this process helped KM to find stable footing. In this commentary, we describe how engaging in reflexive journaling can facilitate understanding of unexpected research encounters and improve awareness of researcher positionality in order to render a more complete understanding of interview data, to contextualize findings, and support development of independent researchers.

Reflection and reflexive practice are critical, introspective analytic processes that lead to a deeper understanding of experiences (Band-Winterstein, Doron, & Naim, 2014). Whereas reflection entails looking back on experiences to make sense of the past, reflexivity entails reflection on social or intersubjective processes (Berger, 2015). Reflexive practice can unveil the ways a researcher shapes how data were created and findings reached.

Researchers embarking on their first qualitative projects (i.e., novice qualitative researchers), in particular, can benefit from engaging in reflexive exercises. Gerstl-Pepin and Patrizio (2013) describe how novice qualitative researchers engage in a developmental process as they learn about their epistemological leanings and weigh decisions about their analysis. They advise educators to use the metaphor of Dumbledore's Pensieve from JK Rowling's wizarding series to chronicle experiences and dilemmas, and attempt to view them from different perspectives. In this series, wizards store memories of events in the Pensieve, and can use this device to witness events again for further contemplation. Although Gerstl-Pepin and Patrizio

(2013) highlight the benefits of discussing these reflections in a classroom setting, this is not always possible for undergraduate- and graduate-level researchers completing theses and dissertations. With the exception of an advisor and peers sympathetic enough to volunteer as "sounding boards," there is often little opportunity for reflexive conversations. Reflexive journaling, however, can retain discursive features and help new researchers resolve problems during research studies.

To elucidate the unique benefits of reflexive journaling for novice researchers, in this commentary we draw on experiences from an in-depth qualitative interview study conducted as a part of a master's-level dissertation (thesis). The purpose of the study was to learn about carers' experiences accessing information from community service organizations in a large metropolitan English city in 2015 (n=11). Further information about the study can be found in Meyer (2018). It is also relevant for readers to have some sociodemographic information about the authors. KM is a White American woman in her 20s. RW is a White Irish woman in her 30s. Reflexive journaling was added to the research protocol per RW's recommendation following the first interview. In tandem with advisement, journaling supported navigation of procedural and ethical challenges, and increased KM's understanding of her own positionality.

What is "reflexive journaling"?

Journaling during the research process does not in itself result in reflexive practice, but journaling can facilitate reflexivity. The opportunity for researchers to recall field experiences that might otherwise be dismissed can encourage iterative attempts to understand and contextualize intersubjective aspects of research encounters (Ortlipp, 2008). By using journals, novice researchers in social work can reconsider previous research encounters in light of new knowledge from coursework, literature, advisement, field experience, and clinical internships.

Although we do not propose a generic structure for reflexive journal entries, we describe the process KM used given that reflexive insights were successfully achieved using this approach. During data collection, KM typed one to three page journal entries within one day of each interview. Entries began by describing unexpected, uncomfortable, or otherwise notable field encounters—often through posing multiple "burning" questions—before reflexively exploring possible answers to these questions. KM raised questions such as: *Did I change the way I posed questions to this participant compared to previous interviews? Did the participant appear uneasy?* A reflexive perspective was used to address secondary questions, such as: *Why did I make changes in how I posed questions, and how did this reflect my assumptions about the participant? Did interview questions reflect implicit assumptions about caregiving that were at odds with the participant's experiences?* Next, encounters that could not be interpreted to a satisfactory degree through journaling were raised in dissertation supervision meetings with RW to achieve improved interpretation. Entries were not shared with RW to support KM's ability to confront complex matters without modifying entries to maintain an idealistic appearance, but key ideas were discussed with RW. Although reflexive journaling can be used throughout the research process (Band-Winterstein, Doroa, & Naim, 2014; Berger, 2015), we primarily describe its advantages while collecting data.

Advantages of reflexive journaling

While presumably all researchers encounter unexpected challenges while in the field, novice researchers have less experience on which to draw to address issues in-the-moment. Reflexive journaling can help to develop strategic and carefully considered ways to address challenges. Using examples from KM's interview study, we elaborate on how reflexive journaling can address challenges in the field and help researchers understand positionality.

Addressing challenges in the field

Fine-tuning interview technique. Researchers often use techniques during in-depth interviews to prompt detailed answers from participants (See Rowley, 2012). By reflecting on which techniques were most effective, novice researchers can build a "toolbox" of approaches to use in future interviews. Reflexive practice can also uncover ineffective or poorly applied techniques. For example, KM found that making brief comments following participant responses encouraged elaboration. However, in some instances, she realized comments were inadvertently value-laden and appeared to erode trust. For example, one participant become hesitant in her responses after KM off-handedly said, "That's good of you to look after your mother-in-law." Given the women's apparent lack of choice in providing care, the trite comment may have been perceived as reinforcement of the societal pressures she faced to be her mother-in-law's carer. Students of social work frequently—but not always—do not share the same experiences as the individuals they interview. Students who are on the "outside" of the experiences they are studying may be naïve to important verbal nuances that can impact the interviewing process (Berger, 2015). A self-aware, reflexive approach can keep awkward and potentially hurtful encounters in check. McNair, Taft & Hegarty (2008) similarly describe using a reflexive perspective while reviewing interview transcripts with advisors. This kind of critical review and reflection improved KM's skills and helped to build rapport with participants.

Working through ethical dilemmas. Another area of qualitative research fraught with challenges are "ethics in practice" (Rallis & Rossman, 2010). Although new researchers are often taught procedural requirements during methods coursework, adhering to Institutional Review Board (IRB) forms does not guarantee ethical research. Reflexive exercises can be used to weigh ethical and practical considerations to maintain ethics in practice. For example, when a

participant asked KM to not tape record their conversation, KM did not know whether the material could ethically be used in the analysis since the collection process did not strictly adhere to the procedures described in the IRB application. Further deviating from procedural norms, the participant brought two peers, also carers, to the interview. But, because the participants—now plural— already gave their time and the three women were not concerned about lost privacy amongst themselves, KM completed the interview after the women agreed to review notes taken during the interview. Eventually this approach was approved by the IRB, and the approved interview notes were included in analyses. In the meantime, reflexive journaling provided an opportunity to independently weigh this approach immediately following the interview. Specifically, concerns about reduced accuracy and deviance from approved protocols were compared to benefits, which included putting the participants at ease and respecting cultural norms that placed heightened value on some types of privacy (Levkoff & Sanchez, 2003). Similarly, in her interview study with older Caribbean women living in Canada, Mullings (2004) describes participants' discomfort during the consenting processes; participants asked to consent only after reviewing the final research project. It is likely not a coincidence that the interview with the three women described above was also the only interview conducted with participants who were not white British. As described by Mullings (2004), ethical procedures meant to "empower" participants are imbued with majority culture values and norms. This can place undue pressure to comply with these procedures on participants who do not necessarily share these values, or who interpret them differently. KM's initial inclination when journaling about this interview was to describe the requested modifications using problem-focused language, based on a sense of unease with being unable to comply with the approved IRB protocols. However, after discussing alternative perspectives with RW, KM became aware of the possible

nuances influencing this encounter, and increased her appreciation for incorporating an ethics-in-practice approach to accommodate participants from a variety of cultures.

Understanding one's positionality

Positionality, or one's social position compared to another's, renders each research encounter unique. Reflexivity can promote understanding of self-presentation in a researcher role, and understanding of differences between the researcher and participant.

Exploring self-presentation as a researcher. For the novice researcher, occupation of the researcher role in itself is novel. While gender, race, nationality, socioeconomic status are familiar characteristics to navigate in everyday social encounters—at least when the research occurs in relatively familiar social settings— what it means to be a researcher is less familiar. Adding to this complexity, this role can be "played" in different ways. As Atkinson and Silverman (1997) describe, interviews are inherently performances, where the talk show-style format encourages the construction of self for both researchers and participants.

Seeking to convince her participants of her "researcher" status, KM wore business attire (a jacket and suit trousers) during initial interviews, a costume that she later realized could affect the interviews in unexpected ways. Similar to reflections from Zubair, Martin, & Victor (2012) on the impact of wearing traditional Pakistani dress during interviews in London, participants reacted differently to the "costume." Although not observed in early interviews, while talking to one participant, the formal dress seemed to undermine trust. This carer asked not to be recorded. She gazed over at the notepad as KM took notes. She double checked that her name would not be shared with anyone. Reflecting on this encounter revealed the possibility that attire signaled officialdom. This could be disconcerting for a carer who had battled with authorities over eligibility for services, a possibility explored while writing about the encounter and again in

discussion with RW. After realizing this, in future interviews, more casual attire was selected, similar to the plain attire described by Mullings (2004). Assessing the affect of dress and self-presentation in journals can make social work researchers aware of, and therefore more capable of responding to, participants' experiences of field encounters and how these might affect responses.

Examining differences. Reflexive journaling on positionality is also useful while recruiting participants. To recruit carers, KM sent a message to a Meet Up group, a website where individuals schedule activities and "meet up" in person. KM approached this group because, based on the group's description, members belonged to the age group most likely to be carers. However, an initial message to the group's leader asking to pitch the study to members elicited an angry response; he was offended at being messaged because of the group's self-described age. Engagement in reflexive thought helped to untangle possible causes of this response.

To understand unexpected encounters like the one described, novice researchers might consider using a guided approach to reflexive practice; we suggest applying the Contextual Adult Life Span Theory for Adapting Psychotherapy (CALTAP) model developed by Knight and Poon (2008). Devised for clinical therapy encounters, CALTAP encourages therapists to consider how cohort, socio-cultural context, maturity, and specific challenges affect therapy. (In a reflexive journal entry, a question prompt using this model might be, *How did cohort differences impact interview exchanges?*) Components of the CALTAP model were applied in journal entries to understand the angry message. For example, KM examined the possibility that she failed to recognize cultural nuances in a different country than her own regarding mention of age. Other considerations included age and cohort differences guiding use of technologies. Whereas KM, a

younger adult, used the online program to meet new people, the program could be adapted as a tool to organize an existing group of tightly-knit individuals. In the second case, a researcher could be seen as intruding. Novice qualitative researchers may find the CALTAP model useful as a framework for reflexive practice since they may be younger and from more recent cohorts than participants, providing additional opportunity for misunderstandings to occur (Underwood, Satterthwait & Bartlett, 2010). Although there is no way of knowing for certain why this particular recruitment approach turned sour, hypotheses generated in journals could be brought back to RW to help strategize more effective approaches to recruitment.

Conclusion

For novice researchers, reflexive journaling can provide guidance on handling challenging situations infrequently described in published research. Entries help to critically engage with technical and ethical decisions made in the field, and can help researchers with less experience understand how they shape interactions with participants. For novice researchers wishing to add reflexive journals to their research plan, questions will likely come naturally, prompted by self-conscious concerns about the research process. New qualitative researchers in gerontology might also consider application of the CALTAP model to understand research encounters. Reflexive journaling can add a discursive component to decisions made throughout the research process and increase self-awareness, thereby enabling new researchers to more confidently make their way through the sometimes murky waters of qualitative research.

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