

The NERA Researcher

The President's Message



Dear NERA Colleagues,

I hope everyone had a good summer and is just as excited for fall. For me, summer always goes by too quickly, but this year, it seems it was gone in the blink of an eye amid conference planning and several big projects at work. But guess what—the end of summer also spells we're only weeks away from our annual NERA conference in Connecticut,

and I cannot wait to see everyone in October!

The conference theme this year is *Where do we go from here? Shaping the future of education together*. As we grapple with old and new challenges in education, moderated by current and ongoing events globally, domestically, and locally, I hope this theme inspires and encourages us all to pause, reflect, study, and discuss how to better serve our students, teachers, and stakeholders at large, so that we can use our time in education efficiently and effectively toward creating a world where every learner can come out sharper, stronger, and better.

To help lead this effort, the Conference Co-chairs and I have booked two phenomenal keynote speakers and curated a rich set of workshops, panels, and sessions based on a solid number of excellent proposals we received this year. In addition to the outstanding keynotes by Dr. Jamila Lyiscott (a.k.a., “Dr. J”) and Dr. Fabienne Doucet, we have six highly engaging workshops on the latest developments in educational research and measurement, a number of panels on topics ranging from culturally responsive teaching to social and emotional learning, to making sense of K-12 research in a rapidly changing environment. We also have a variety of presentation formats, including paper, poster, and roundtable sessions, affording you the opportunity to connect with colleagues

Continued on page 3

Inside this issue

Executive Committee, Board of
Directors & Committee Chairs
.....2

Message from the Editors
.....2

Member News3

2023 NERA Elections.....5

2023 NERA Conference
Overview and Highlights....7

Keynote Speakers.....8

At-A-Glance Schedule.....9

Workshops..... 10

Panels13

2023 NERA Conference
Registration and Hotel
Information14

2023 NERA Mentoring Program
Update.....15

GSIC Graduate Student
Lounge17

2023 NERA Membership
Advocacy Committee
Update18

2023 NERA Conference
Ambassadors Update20

2023 NERA Site Selection
Committee Final Report.....21

2023 NERA Membership
Committee Update22

Qualitative 101: Deciphering
the Language of Qualitative
Research23

The NERA Researcher

The NERA Researcher is the official newsletter of the Northeastern Educational Research Association.

Message from the Editors

Another summer is drawing to a close, and October is just around the corner. And you all know what that means. The annual NERA conference! As you read this issue of the *Researcher*, you can see that our co-chairs, Francis, Mina, Maura, and Sarah, have been very busy. As we celebrate 54 years of membership and fellowship, the co-chairs, President Bo Bashkov, and the committee chairs and members have put together a program that offers something for everyone. Watch for emails with additional information about the conference in the coming weeks. In addition to our two outstanding keynotes, Jamila Lyiscott “Dr. J” and Fabienne Doucet, we have several exceptional workshops and panels and our usual selection of great paper sessions and symposia. See pages 7-13 including the at-a-glance on page 9.

We also have a special treat in the *Researcher*. Beginning with this issue, we are publishing a three-part series of articles from Felice Billups of Johnson & Wales on qualitative research terminology, procedures, and positioning. Intended for social science researchers new to the qualitative paradigm, Part I explores the language of qualitative inquiry. See page 23. So, suppose you would like to join us for another stimulating and fun NERA conference and have a chance to connect or re-connect with your colleagues and friends. In that case, the following pages contain complete information about becoming a member or renewing your membership, registering for the conference, and securing a room at the Trumbull Marriott Shelton. In addition, find out what the GSIC Graduate Lounge has in store and catch up on what the committees have been up to. Michael and I look forward to seeing all of you in October. Safe travels.

Barbara J. Helms & Michael Wolter
NERA Researcher Co-Editors

Executive Committee

President:
Bo Bashkov
IXL Learning

Past President:
Nina Deng
Kaplan, Inc.

President-Elect:
Jonathan Steinberg
EurekaFacts

Treasurer:
Andrew Jones
American Board of Surgery

Secretary:
Katrina Roohr
Educational Testing Service

Board of Directors

Tabitha Bellamy (2020-2023)
New Jersey Department of Education

Jade Caines Lee (2021-2024)
The JC Research Group

Madison Holzman (2021-2024)
Curriculum Associates

Steven Holtzman (2023-2023)
Educational Testing Service

Kate Nolan (2022-2025)
Amira Learning

Thai Ong (2022-2025)
NBME

Matthew Speno (2020-2023)
Salem State University
Graduate Student Issues Committee Chair

Appointed Positions

2023 Conference Co-Chairs:
Francis O'Donnell
NBME

Mina Lee
Cambium Assessment

Sarah Ferguson
Rowan University

Maura O'Riordan
University of Massachusetts Amherst

The NERA Researcher Co-Editors:
Barbara Helms
Independent Consultant/ Freelance Copy-Editor

Michael Wolter
Post University

NERA Webmaster:
Yu Bao
James Madison University

NERA Webinar Coordinator
Alia Ammar
Drexel University

NERA Conference Proceedings Co-Editor for Digital Commons:
Kate Nolan
Amira Learning

Beth Perkins
American Association of Colleges and Universities

Mentoring Program Co-Chair:
Kerry Vieth
American Institutes for Research (AIR)

Krishna Chaltanya Rao Kathala
University of Massachusetts Amherst

Bethany Fishbein
Boston College

STANDING COMMITTEES

Communications Chair:
Jerusha Henderek
NBME

Membership Chair:
Rory Lazowski
College Board

Nominations Chair:
Nina Deng
Kaplan, Inc.

Graduate Student Issues Chair:
Matthew Speno
Salem State University

Infrastructure Chair:
Nikole Gregg
HumRRO

AWARDS COMMITTEES

Thomas Donlon Mentoring Award Chair:
Jennifer Randall
University of Michigan

Leo D. Doherty Memorial Award Chair:
Tia Fetcher
Defense Personnel Analytics Center

Educator-As-Researcher Chair
Salika Lawrence
The College of New Jersey

Tajma Cameron
Drexel University

Lorne H. Woollatt Distinguished Paper Chair:
Rochelle Michel
Smarter Balanced

AD HOC COMMITTEES

Member Advocacy Chair:
Pamela Kaliski
American Board of Internal Medicine

Conference Ambassadors Chair:
Carol Barry
American Board of Surgery

Site Selection Chair:
Jonathan Steinberg
EurekaFacts

Strategic Planning Chair:
Steven Holtzman
Educational Testing Service

in so many ways while moving your own expertise and the field forward.

Graduate Student Issues Committee (GSIC) Chair Matthew Speno has been busy holding summer webinars and preparing for this year's conference, so look out for more details as we get closer to October. The Mentoring Program happy hour enjoyed by graduate students, early career scholars, and seasoned professionals alike is another highlight you don't want to miss. Kerry Vieth and Bethany Fishbein have been working with the incoming Chair, Krishna Chaitanya Rao Kathala of UMass, to prepare for the event, while NERA Board member Madison Holzman has graciously offered to help Krishna run this mentoring and networking happy hour on Thursday evening. Please note that our Business Meeting will take place Friday morning instead of Friday lunch. I hope this change will allow even more of you to attend. Back by popular demand are two crowd favorites: the Three-Minute Thesis (3MT) competition and karaoke night hosted by our very own Frank Padellaro (NERA 2022 Conference Co-chair). Thank you so much to all these volunteers who made the NERA conference such a special event!

A special thank you goes to this year's Conference Co-chairs (Francis O'Donnell, Sarah Ferguson, Maura O'Riordan, and Mina Lee) for their tremendous efforts to organize the NERA event of the year that we all know and love. I started meeting with the team over a year ago, and we've accomplished so much in preparation for this year's conference. We've been swamped lately, just weeks away from the conference in October, and I can't thank the team enough for all the hours they've put in toward this amazing event. Our Treasurer, Andrew Jones, has also been busy ensuring our finances are in check. He's been instrumental in processing our institutional memberships and setting up PayPal for our "Sponsor a Graduate Student" option for those willing to make a donation outside of their conference registration. Please consider this option if you have the means to do so. I am happy to report that, as of late August, we've secured over \$28,000 in pledged funds from institutional memberships to help subsidize the cost of the 2023 conference. Thank you to all 21 sponsors for their generous support! Last but not least, I'd like to thank the NERA Executive Committee, the Board of Directors, and all committee chairs and members.

If you made it this far in my message and didn't recognize yourself in the paragraphs above but were wondering how

Member News

Jonathan Steinberg, 2023-2024 NERA President, was recently appointed as the new Director of Research and Analytics at EurekaFacts, based in Rockville, MD. As a member of the senior leadership team, he will help to influence the growth of the company and, together with his team, build and maintain a healthy research and analytics practice, building on his more than 20 years of analytical experience in education and consumer research.

Shu Jen Chen-Worley, associate professor at Touro University, was elected SIG officer Treasurer/Secretary for Survey Research in Education of the American Educational Research Association (AERA) for the 2023–2024 term. She said, "It's always delightful and a pleasure to connect with colleagues from diverse backgrounds and expertise who share the same interest in education research and practice."

Matthew Speno, GSIC Chair, has a new publication: Speno, M. (2023). Human Rights, High School Sports, and Special Education. In: Zajda, J., Vissing, Y. (eds.) *Globalisation, Human Rights, Sports, and Culture. Globalisation, Comparative Education and Policy Research*, vol 37. Springer, Cham. https://doi.org/10.1007/978-3-031-38457-8_6

Matthew also has two other projects in the works. He's working on a chapter for an edited volume that addresses Globalisation, Cultural Diversity, and Human Rights. In its current form, he is developing a piece with a draft title of Human Dignity and Cultural Rights: Somali Refugee Migration

you could get involved, get in touch now or talk to me at the conference. We have several soon-to-be vacant positions, and I'd love to tell you more about them and see if they would be a good fit for you. NERA is an entirely volunteer-run organization, and we need people like you to serve our community of educators and researchers and advance our mission. Learn more on [our website](#) and follow our updates on [LinkedIn](#).

I am super excited for this year's conference. We have a full program of learning, teaching, networking, and socializing, so be sure to [register](#) and [book your hotel](#) soon. As for many of you, NERA is "home," and I am very much looking forward to homecoming in a few weeks. See you there!

Best,
Bo Bashkov
NERA President

Would you like to join the phenomenal team that coordinates and produces *The NERA Researcher*? We are searching for interested and dedicated volunteers who would like to serve NERA by contributing to the important work necessary to put out *The NERA Researcher*. All those interested are encouraged to complete [this](#) link. <https://forms.gle/amyRKenuRCohBc7j7>).



**Fostering Greater Student Learning
For Over 20 Years**

*Supporting states and local districts across the country
to design and implement high-quality assessment and
accountability systems.*

 @NCIEA1
www.nciea.org

 **Center for
Assessment**
The National Center for the Improvement
of Educational Assessment, Inc.

31 MOUNT VERNON STREET • DOVER, NH 03820 • 603.516.7900

focuses on how Somali refugees have created an intentional community through a secondary migration to a New England Factory town in decline and how Somali diversity provided economic and population growth.

His second project is a collaborative project with colleagues from his Post-doctoral Fellowship with the Center for Childhood and Youth Studies, which is out of Salem State University. They are developing a research study to inquire how justice can be defined through the perspective of each of our unique disciplines and how we can identify commonalities related to youth transition to educational, vocational, and/or career opportunities.

If you have any news you would like to share in the *Researcher*, send an email it to: theNERAResearcher@nera-education.org

2023 NERA Elections

Nina Deng, Chair

On behalf of the Nominations Committee, I am excited to announce that we have an exciting slate of candidates for the following elected positions:

For President:

Lisa Keller, University of Massachusetts Amherst

Frank Padellaro, Cognia

For Secretary:

Sarah Ferguson, Rowan University

Mina Lee, Cambrium Assessment

For Board of Directors:

Rory Lazowski, The College Board

Brian Leventhal, James Madison University

Beth Perkins, American Association of Colleges & Universities

Duy Pham, University of Massachusetts Amherst



Each member will receive an email with voting instructions around mid-September. Voting will remain open until end of September.

We want to thank the candidates for running for these vital roles which are crucial for the success of the organization. We also thank everyone for submitting nominations and for participating in the voting.

For candidates' biographies and photos go to:

http://www.nera-education.org/docs/NERA_Election_Candidate_Statements_2023_v3.pdf

Finally, a special thank you goes to Kate Schaefer and the Infrastructure Committee for organizing and running the 2023 election. If you have any questions about the 2023 NERA election, please feel free to reach out to me at nominationscommittee@nera-education.org.

Sincerely,

Nina Deng

Past President and Chair of the Nominations Committee

edCount is pleased to sponsor NERA

*Dedicated to Equity and
Excellence for All Students*

PRACTICE AREAS

- Standards, Assessment, and Accountability
- Students with Disabilities
- Emerging Bilingual Students

SERVICES

- Test Design and Development
- Policy Analysis & Technical Assistance
- Validity Evaluation & Technical Documentation
- Educator Supports
- Project Management



1800 Diagonal Road, Suite 600 | Alexandria, VA 22314
www.edCount.com | (202) 895-1502 | info@edCount.com

Curriculum Associates®





54th Annual NERA Conference Overview & Highlights October 18–20, Trumbull CT

*Francis O'Donnell, Sarah Ferguson, Maura O'Riordan,
and Mina Lee, Conference Co-Chairs*

Dear NERA Members,

We are so excited to share our plans for the upcoming conference! Our conference theme for 2023:

Where Do We Go From Here? Shaping the Future of Education Together

The 2023 conference theme starts with a question: *Where Do We Go from Here?* How do we find a path forward in the aftermath of a pandemic and the face of learning disruptions, teacher shortages, and persistent areas of inequality? Today's challenges are complex and interconnected, calling for both reflection and action. Still, as a community of educators and researchers, we are uniquely positioned to find solutions. Our hope is that NERA members, current and new, will embrace this challenge and bring fresh observations, ideas, and perspectives to help advance our collective knowledge and expertise.

Additionally, we encourage NERA attendees to critically reflect on what “*together*” means, evaluating who is involved in educational research and practice decisions, who is invited and who is responsible for these decisions, and who is not at the table when these conversations happen. Finally, we especially encourage researchers to examine these issues through a *diversity, equity, inclusion, and justice* (DEIJ) lens related to education and educational research. Our keynote speakers are intentionally aligned with this theme, and we cannot wait to hear from these two outstanding scholars!



KEYNOTE SPEAKERS

NERA 2023 Conference KEYNOTE SPEAKER

WEDNESDAY
October 18, 2023 @ 7pm

Trumbull Marriott Shelton
Trumbull, CT

Jamila Lyiscott, Ph.D. ('Dr. J')
Associate Professor of Social
Justice Education, UMass



Jamila Lyiscott a.k.a 'Dr. J' is an Associate Professor of Social Justice Education at the University of Massachusetts Amherst, where she is the founding co-director of the Center of Racial Justice and Youth Engaged Research. Her community-engaged research focuses on racial equity, youth activism, and the power of hip-hop and spoken word in education. Jamila is a community-engaged scholar, nationally re-

NERA 2023 Conference KEYNOTE SPEAKER

THURSDAY
October 19, 2023 @ 12pm

Trumbull Marriott Shelton
Trumbull, CT



Fabienne Doucet, Ph.D.
Executive Director of the NYU Metropolitan
Center for Research on Equity and the
Transformation of Schools

Fabienne Doucet is the Executive Director of the NYU Metropolitan Center for Research on Equity and the Transformation of Schools and an Associate Professor of Early Childhood Education and Urban Education in the Department of Teaching and Learning at the NYU Steinhardt School of Culture, Education, and Human Development. She is also an affiliated faculty member of the NYU Institute for Human Development and Social Change and the Center for Latin American and Caribbean Studies. Learn more about her at <https://steinhardt.nyu.edu/people/fabienne-doucet>

WEDNESDAY	
8:30 – 5:30	<i>Registration Table Open (Foyer)</i>
9:00 – 12:00	Workshop: An Introduction to Key Components of Bayesian Inference
10:00 – 12:00	Workshop: Quantitative Instrument Development: Creating Questionnaires to Measure Constructs
1:30 – 3:00	Panel: Reimagining the Role of Schools in Promoting Mental Health, SEL, and Resilience <i>Paper Sessions / Symposia</i>
1:30 – 4:30	Workshop: Technical Foundations of Generative Artificial Intelligence: Applications to Measurement Workshop: Theory of Action: Guiding Assessment Design and Validity Research
3:15 – 4:45	<i>Paper Sessions / Symposia</i>
5:00 – 5:45	Graduate Student Issues Committee Social (Foyer)
6:00 – 8:00	Dinner and Wednesday Keynote Address: Dr. Jamila "J" Lyiscott (Ballroom)
8:00 – 11:00	NERA Welcome Reception (Merritt)
THURSDAY	
8:30 – 5:30	<i>Registration Table Open (Foyer)</i>
7:00 – 8:15	Breakfast (Ballroom) & NERA New Member Breakfast (Salon)
8:15 – 9:45	Workshop: Designing Adequately Powered Multilevel Studies Cluster Randomized Trials to Detect Main Effects, Moderation, and Mediation <i>Paper Sessions / Symposia</i>
10:00 – 11:30	<i>Paper Sessions / Symposia / Roundtables / Poster Session</i>
11:30 – 1:00	Lunch and Thursday Keynote Address: Dr. Fabienne Doucet (Ballroom)
1:15 – 2:45	<i>Paper Sessions / Symposia / Roundtables / Poster Session</i>
3:00 – 4:15	<i>Paper Sessions / Symposia / Poster Session</i>
4:30 – 5:45	Panel: Catalysts for Engagement: Culturally Responsive Teaching Strategies to Promote Deep Learning Among Marginalized Groups <i>Paper Sessions / Symposia</i>
5:45 – 6:30	NERA Mentoring Program Happy Hour (Parallel Post Bar)
6:30 – 8:30	Dinner and Presidential Address (Ballroom)
8:30 – 11:00	NERA Presidential Reception (Merritt)
FRIDAY	
8:00 – 10:00	<i>Registration Table Open (Foyer)</i>
7:00 – 8:30	Breakfast and NERA Business Meeting (Ballroom)
8:30 – 10:00	<i>Paper Sessions / Symposia</i>
8:30 – 11:30	Workshop: Integrating Generative AI in Assessment Engineering: Hands-On Training with ChatGPT
10:15 – 11:45	Panel: Evolving K-12 Education: How Scholars Make Sense of Their Research in a Rapidly Changing World <i>Paper Sessions / Symposia</i>
11:45 – 12:45	Farewell and To-Go Snack (Ballroom)

WORKSHOPS

Wednesday, October 18, 2023 | 9 a.m.-12 p.m.: An Introduction to Key Components of Bayesian Inference

Facilitator: Brian C. Leventhal, *James Madison University*

Abstract: Understanding Bayesian statistics is an essential skill for researchers and practitioners of educational research. This workshop presents a conceptual introduction to the foundations of Bayes, including 1) specifying a prior distribution, 2) summarizing evidence using a likelihood function, 3) forming a posterior distribution, and 4) making inferences. The workshop is designed at an introductory level to be accessible to attendees wishing to familiarize themselves with Bayesian techniques. Although some technical details will be discussed, the focus is on a conceptual understanding, making this workshop accessible to all educational researchers.

Wednesday, October 18, 2023 | 10 a.m.-12 p.m.: Quantitative Instrument Development: Creating Questionnaires to Measure Constructs

Facilitator: Stacey Kite, *Johnson & Wales University*

Abstract: This interactive working session will guide participants through the development of a quantitative questionnaire. The session begins with the identification of the purpose and resulting actions of the study in which the instrument will be used. Next, the session will assist participants in operationally defining variables and constructs and selecting existing literature and instruments to support them. Finally, after defining the study population, participants will learn how to develop new items and modify existing instrument items for their study. Participants are encouraged, but not required, to bring a researchable topic, literature to support the topic, and existing instruments.

Wednesday, October 18, 2023 | 1:30–4:30 p.m.: Technical Foundations of Generative Artificial Intelligence: Applications to Measurement

Facilitator: Susan Lottridge, *Cambium Assessment*

Abstract: Generative artificial intelligence tools, like ChatGPT, are likely to deeply impact education and measurement by changing what is taught and how it is taught, what constructs are measured, and how they are measured. We, as measurement professionals, should know their design, potential use, and issues. This session will describe, in detail, the architecture of these models, provide examples of the use of these tools in measurement, and discuss issues and opportunities in assessment. Participants will learn the steps in building models for each phase of the architecture and leave with code that can be run to implement their own models.



Driving Innovation and Using Data to Meet the Evolving Needs of Education

We design our assessments and learning solutions with industry-leading insight, rigorous research and development, and an unwavering commitment to quality so users can make data-driven, informed decisions with confidence.

To learn more, visit ets.org/research



Copyright © 2021 by ETS. All rights reserved. ETS and the ETS logo are registered trademarks of ETS. 724180361

BUROS

CENTER FOR TESTING

TEST REVIEWS • ASSESSMENT LITERACY
PSYCHOMETRIC CONSULTING

Wednesday, October 18, 2023 | 1:30–4:30 p.m.: Theory of Action: Guiding Assessment Design and Validity Research

Facilitators: Andrea Pope & Ross Markle, *DIA Higher Education Collaborators*

Abstract: Whether you are a seasoned assessment professional, a graduate student building a new assessment, or somewhere in between, this workshop is for you. A Theory of Action (ToA) provides a strategic overview of assessment components, action mechanisms, impacts, and the connective tissues among them, ensuring that assessment programs contain all the relevant components to lead to the desired impact while providing a roadmap for vital validity research. Workshop participants will engage in an active and collaborative process for building ToAs for themselves or others, using real-world examples—or even one of your own!

Thursday, October 19, 2023 | 8:15–9:45 a.m.: Designing Adequately Powered Multilevel Studies Cluster Randomized Trials to Detect Main Effects, Moderation, and Mediation

Facilitators: Ben Kelcey, *University of Cincinnati*; Fangxing Bai, *University of Cincinnati*; Amota Ataneka, *University of Cincinnati*; Yanli Xie, *Florida State University*

Abstract: We describe the conceptual logic and mechanics of multilevel studies (e.g., cluster-randomized trials) and train participants to plan multilevel studies with adequate statistical power to detect main, mediation, and moderation effects. We introduce participants to the free PowerUp! software (implemented in Shiny Apps, an R package, and Excel; see <https://www.causalevaluation.org/power-analysis.html>) designed to estimate the statistical power to detect main, mediation, and moderation effects across a wide range of designs (e.g., cluster-randomized, multisite, partially nested, regression discontinuities). The workshop combines a lecture with hands-on software practice. Participants should bring a laptop to the session.

Friday, October 20, 2023 | 8:30–11:30 a.m.: Integrating Generative AI in Assessment Engineering: Hands-On Training with ChatGPT

Facilitator: Jaehwa Choi, *The George Washington University*

Abstract: This training introduces the integration of Generative AI, ChatGPT, with Assessment Engineering (AE) for psychometricians and assessment service providers. Attendees will learn about Assessment Knowledge Engineering technologies (e.g., Automatic Item Generation) to generate psychometrically sound digital assessment items by leveraging the new advancements of Generative AI. The training includes theoretical and practical exercises on the application of AE in collaboration with subject matter experts (SMEs). Participants will gain practical experience with the open-access AE platform, CAFA Lite, and learn how to strategically integrate ontology modeling with computer-assisted template coding with the power of Generative AI. The training is designed for psychometricians who want to expand their knowledge of digitally innovative and sustainable methods in the AE framework. Attendees are required to bring their own laptops.

PANELS

Catalysts for Engagement: Culturally Responsive Teaching Strategies to Promote Deep Learning Among Marginalized Groups

Panelists: Suzanne Brooks, *Encore Education Services*; Adele J. Doyle, *City University of New York*; Greg Gershowitz, *St. John's University*

Reimagining the Role of Schools in Promoting Mental Health, SEL, and Resilience

Panelists: Stuart Grossman and Ellen Margolin, *Touro University*; Rebecca Clark Stoyanova and Peling Li, *Johns Hopkins University*; Amra Sabic-El-Rayess and Vik Joshi, *Columbia University*

Evolving K-12 Education: How Scholars Make Sense of Their Research in a Rapidly Changing World

Panelists: Dara Bright, Tajma Cameron, Turea Hutson, Neisha Young, Sinead Meehan, and Ellana Black, *Drexel University*

We look forward to sharing more details regarding the 2023 NERA conference as we continue our planning for October, so keep an eye out for updates!

NERA is a volunteer-based organization. We need your help to ensure a high-quality conference in October. Please sign up to be a session chair or discussant!

Volunteer to be a session chair or discussant.

Your NERA 2023 Conference Co-Chairs,
Francis O'Donnell, Maura O'Riordan, Mina Lee, and Sarah Ferguson
nera.cochairs@gmail.com



**The Center for Assessment
and Research Studies**

54th Annual NERA Conference

Conference and Hotel Registration

Joining NERA or Renewing your NERA Membership

All attendees of the 2023 NERA Conference must be current NERA members. Before you can register for the conference, you must either join NERA or renew your membership if you have not done so already. Visit the NERA website at <https://www.nera-education.org/> and go to the *Member Log In* section in the upper right corner to find the links to join, renew, or log in. Feel free to reach out to the conference co-chairs with questions at NERA.CoChairs@gmail.com.

Registering for the 2023 Conference

Once you are a member of NERA, you can register for the conference by clicking on [register for the Annual NERA conference](#).

NERA Registration fees include meals, so the registration process includes questions about which meals you anticipate having at the conference. To accurately estimate how many people will be at each meal, *we ask that you take the time to indicate which meals you will attend*.

We are pleased to be able to offer free workshops for NERA this year. While workshops are included in the registration fee, estimates of attendance for each workshop are also helpful for planning purposes, so *please indicate which workshops you intend to attend during the registration process*.

All online conference registration fees are processed through PayPal, but you do not need to have a PayPal account to make a payment—you can pay by credit card on the secure PayPal site.

Please note that to receive the early-bird registration rate, you must register by **September 26, 2023**. After this date, a late fee will be added to the regular rates. The early registration rates for this year are listed below by member type, followed by the late registration rate in parentheses.

Professional Member—\$250 (\$325)

Full-time Student—\$100 (\$150)

Retired Member—\$170 (\$170)

Booking your room at the Trumbull Marriott

Book your room by **September 26, 2023**, to receive the discounted rate of \$157 per night! After that date, the price will increase to about \$215 per night.

Follow [this link to book your room for the NERA conference](#). You may also call the hotel to book at 203-378-1400 and tell them you will be attending the NERA conference.

NERA 2023 Mentoring Program

Match with a mentor or mentee!

A message from the NERA Mentoring Co-chairs:
Bethany Fishbein, Kerry Vieth, and Krishna Chaitanya Rao Kathala
mentoring@nera-education.org

We are thrilled to extend an invitation to all NERA 2023 Conference attendees to participate in the **NERA 2023 Mentoring Program** during the upcoming conference. During the conference, matched pairs will meet at a dedicated happy hour on Thursday, October 19, 2023, at 6:00 p.m.

Sign up to become a mentor if you

- have at least 4 years of career experience in education or educational measurement
- are interested in advising a graduate student or early career professional

Sign up to become a mentee if you

- are currently enrolled in a graduate program in a NERA-related field OR are an early career professional (less than 5 years of post-graduate experience) in a NERA-related field
- are interested in advice on your educational path, dissertation, or career

Register now!!!

Registration form: bit.ly/NERAMentoring2023

The registration deadline is Sunday, October 8, 2023. Based on your responses, the Mentoring Committee will match you with a mentor/mentee who shares your interests.

The Mentoring Committee has facilitated successful mentor-mentee matches since 2012, connecting professionals experienced in NERA-related fields with graduate students and early career professionals through a carefully curated process. Our program has seen tremendous benefits for participants, who have had the opportunity to form meaningful connections outside their existing networks, share research interests, discuss career goals, and explore areas of desired growth. Last year's mentoring event was a resounding success, with nearly 30 mentees and 16 mentors forming strong connections. We received positive feedback from all participants, and we hope these connections have continued to flourish.



Your Partner in Assessment Excellence



ENDICOTT
COLLEGE

The GSIC Graduate Lounge

Matthew Speno, Ed. D., GSIC Chair

I am always amazed when September rolls around, and the BUZZ about the NERA Annual Conference begins to get louder! This year's event will surely impress! I look forward to seeing everyone in Trumbull, CT, October 18–20!

The theme for the 2023 Conference, *Where Do We Go From Here? Shaping the Future of Education Together*, focusing on diversity, equity, inclusion, and justice, this year's conference provides an opportunity for researchers to present their work, ask powerful questions about our industry, and cultivate friendships, new and old! Thank you to the 2023 Conference Co-Chairs for their awesome, untiring efforts in planning, and I mustn't forget to thank Bo Bashkov for his leadership and valuable insights as NERA's President.

We are pleased to announce that the 2022 GSIC Best Paper Award is Mara McFadden, a first-year doctoral candidate at James Madison University. Her paper, "*Will You Give Good Effort During the Test?*" *Simply Asking Increases Examinee's Test-Taking Motivation* was well received by our peer reviewers. A BIG shout out to all who submitted and reviewed papers—your commitment is why NERA and GSIC continue providing a community akin to family! Mara's accomplishment will be highlighted at the upcoming conference with a plaque. Consider submitting your 2023 paper for the GSIC award.

In the lead-up to the NERA Conference, the GSIC will present webinar hangouts to introduce Graduate members to NERA, provide doctoral journey support, and provide professional development on topics like creating an Individual Development Plan (IDP), wellness and time-management strategies, or tips and tricks when moving from a student to doctoral candidate. The tentative date for the first GSIC hangout is Tuesday, September 26th, at 5 p.m. More information to follow via NERA social media. All are welcome!

During the conference, the GSIC will host a Social on Wednesday, October 18th, from 4:45 to 5:30 in the Ballroom Foyer. This event is a great ice-breaking activity for new graduate members to get acquainted, eat some yummy food, and have a fun time while not taking ourselves too seriously! Along with the social, we host two conference sessions.

Our first GSIC session, *The Residual Challenge of COVID-19 on Post-Pandemic Graduate Programs and Chasing a Career in Educational Research*. This session will focus on how graduate programs have had to pivot concerning enrollment, curriculum, or delivery mode, indirectly impacting how a doctoral career can be developed.

The second GSIC session will be a quasi-panel and roundtable discussion on evergreen topics like eating well, getting enough sleep, exercising, and cultivating hobbies, with the twist of understanding how your Pandemic coping strategies can be applied to your academic journey and beyond. We are so excited to meet and welcome you to our NERA graduate family!

Serving on the GSIC is a great way to get involved with NERA and build relationships with other graduate students and professionals. Responsibilities include collaborating with students from various institutions to plan GSIC-sponsored, in-conference sessions and the GSIC student social. GSIC members also work with members of other NERA committees to help with additional tasks as needed. If you are a graduate student and have questions about how to get involved with NERA, contact neragraduatestudents@gmail.com.

2023 Membership Advocacy Committee Update

Pamela Kaliski, Chair

Hello NERA Members!

I hope everyone has enjoyed their summer! I always enjoy those first moments of fall approaching and the refreshing nature of this time of year. Of course, part of this is excitement for the approaching annual NERA conference!

The NERA Membership Advocacy Committee is grateful for the ideas and feedback we received from the post-conference survey last year. We are meeting in September to decide on our next initiatives. We look forward to sharing our progress with NERA membership this fall.

As a reminder, the charge of this committee is to advocate for all of the types of diversity that NERA members represent, focusing on making NERA members feel included in every aspect of the association. NERA is for everyone, and this committee will help to create a safe space that reflects our many layers of diversity.

As always, if you have any particular areas of interest or concern that this committee should consider, please feel free to reach out to us. We are looking forward to listening and learning from you all.





Building the Future of Assessment

We are the world's learning company, driven by a mission to help people make progress in their lives through learning. We are educators, parents, research scientists, technology experts, and content specialists. Our technology-powered assessment tools, content, products, and services support millions of teachers and learners every day. Having delivered more than 100 million online tests for district, state, and national customers, we are committed to inspiring and supporting a lifelong love of learning. Because wherever learning flourishes, so do people.



LEARN MORE AT
PearsonEd.com/future-of-assessment

800-627-7271 | PearsonAssessments.com
Copyright © 2021 Pearson Education. All rights reserved.

UMassAmherst

College of Education

2023 NERA Conference Ambassadors Update

Carol Barry, Chair

Hello NERA members! On behalf of the Conference Ambassadors Committee, I hope you've all had a wonderful and restful summer and are gearing up for what is sure to be a fabulous NERA conference. If you are unfamiliar with our committee, our charge is to welcome new and returning members to the annual NERA conference. We strive to achieve this by providing an open environment that encourages connecting with colleagues across the NERA membership in attendance while also sharing our own NERA experiences with meeting attendees.

This year, we are planning multiple ways to connect with you at the NERA conference, and we will make sure you know how to find us during the conference. As we have done in recent years, we are hosting the new member breakfast on Thursday morning. Please join us for breakfast, coffee, and conversation. Additionally, we are planning a fun networking game to facilitate getting to know your fellow conference attendees. Please keep an eye out for an update from us before the conference, where we will share additional details about these events and introduce ourselves to you.

Finally, the Conference Ambassadors Committee is currently an ad-hoc committee. However, the NERA Board recognizes the committee as a body that is consistently relied upon and would like to hold a vote at the upcoming NERA business meeting to raise the Ambassadors Committee to a standing committee. Please consider attending the Friday, October 20th NERA Business Meeting to vote on this matter.

Please feel free to contact us if you have any feedback, thoughts, or questions. Otherwise, we'll look forward to seeing you in October!

Carol Barry, Chair, NERA Conference Ambassadors Committee (cbarry@absurgery.org).



2023 NERA Site Selection Committee Final Report

Jonathan Steinberg, Chair

Hello NERA Members!

I hope your summer has been great thus far. I am pleased to share the final report of the NERA Site Selection Committee with you. On behalf of the committee members, Tabitha Bellamy, Steven Holtzman, Hank Johnson, Shelby Perry, and President Bo Bashkov, I am happy to inform you that NERA has signed a new three-year contract with the Trumbull Marriott in Shelton, Connecticut. This decision allows us to continue our longstanding relationship with the hotel and host our annual conference there until at least October 2026.

Our work began in November 2022, shortly after last year's conference. We had a clear objective to conduct due diligence on other sites and then engage with the Trumbull Marriott for a potential new contract. Our key considerations included food and beverage costs, hotel room rates, conference space, layout, and transportation accessibility.

We initiated a broad Request for Proposal (RFP) solicitation process and received approximately 35 applications from sites across the New England and Mid-Atlantic regions. After a thorough review, three sites were selected for on-site visits in February: the Sheraton in Parsippany, New Jersey, the Hilton in Harrisburg, Pennsylvania, and the previous host site, the Sheraton in Rocky Hill, Connecticut. The Harrisburg site was subsequently dropped due to unavailability for the required dates.

In April 2023, we invited NERA members to participate in an online preference survey for the two remaining sites, Parsippany and Rocky Hill, as well as Trumbull. The survey responses indicated minimal differences in average preferences across the sites. Based on these results, the committee opened negotiations with the Trumbull Marriott, taking into account concerns raised during the 2022 conference and post-conference survey.

The Trumbull Marriott presented a proposal that addressed the committee's concerns, including lower food and beverage minimum costs, reasonable room rate increases, and a commitment to improve certain aspects of the property. On May 15, 2023, the proposal was presented to the Board and approved.

As the outgoing chair, I am available to address any questions you may have regarding the site selection process or our decision. Please feel free to reach out to me [here](#) at any time. Wishing you a wonderful rest of the summer, we eagerly anticipate welcoming you to the Trumbull Marriott this October.

Best regards,

Jonathan Steinberg
President-Elect and Site Selection Committee Chair
Tabitha Bellamy, Steven Holtzman, Hank Johnson, Shelby Perry

Membership Committee Update

Rory Lazowski, Chair

Wow—the NERA 2023 Conference is just around the corner! As trite as it may sound, this year really has flown by. We're looking forward to seeing everyone soon and getting a chance to re-connect with colleagues and, for some, connecting for the first time.

The Membership Committee will work closely with the NERA Conference Ambassadors preparing for the conference. We are finalizing dates and times for various events, such as the new member breakfast and other networking activities and prizes.

We also plan to reach out to NERA members prior to the conference to introduce ourselves. Both Membership Committee and Ambassador Committee members will be available before and during the conference to answer any questions you may have!

We are looking forward to seeing everyone in Trumbull this October. See you very soon!



JOHNSON & WALES
UNIVERSITY

Johnson & Wales University offers an
Ed.D. in Educational Leadership with a
Higher Education track at the Providence Campus.
For information, please call 401-598-1015
or email pvdgrad@admission.jwu.edu.

jwu.edu/edd

Qualitative 101: Deciphering the Language of Qualitative Research

Felice D. Billups, Ed.D., Johnson & Wales University
Johnson & Wales University

This article is the first in a three-part series on qualitative research terminology, procedures, and positioning. Intended for social science researchers new to the qualitative paradigm, Part I explores the language of qualitative inquiry.

Research terminology can be confusing. A single practice or concept may offer multiple definitions or interpretations. It is appropriate, then, in a field where multiple realities are the foundation for inquiry, multiple interpretations of the terminology are the norm.

Why is this? Qualitative research terminology varies in definition and application because the roots of the qualitative tradition cross numerous fields of study, such as anthropology, sociology, psychology, political science, cultural studies, and philosophy. Since each discipline frames its research orientations distinctively, confusion results when those orientations are applied to a particular framework and pose challenges for novice researchers trying to make sense of the qualitative lexicon.

Qualitative, Naturalistic, or Constructivist?

What do we mean when we say ‘qualitative research,’ and what is the difference between the qualitative, naturalistic, and constructivist labels associated with qualitative inquiry? These designations are often used interchangeably; some scholars suggest that they overlap or, at best, represent different points on a continuum (Lincoln & Guba, 1985; Maxwell, 2013; Patton, 2015).

The earliest references to qualitative methodologies were recorded by Herodotus in 454 B.C. We do not, however, find specific references to qualitative inquiry in contemporary literature much before the 1970s. Prior to that, qualitative procedures were largely identified as supplemental or alternative/alternate research methods. The quantitative positivistic worldview dominated the social science research field.

‘Qualitative’ denotes the exploration of people’s lives, behaviors, emotions, and perceptions using a variety of methods to explain and understand social phenomena with minimum interference from the environment (Denzin & Lincoln, 2003). All qualitative research is conducted in natural settings, where multiple realities collectively represent the unique perspectives of participants. These projects employ emergent designs within an inductive framework, and the findings are interpreted holistically. Denzin and Lincoln (1994) state that qualitative research focuses on how people make sense of and interpret phenomena in their natural settings. The roots of qualitative inquiry can be found in the humanities, anthropology, and sociology.

Similarly, Denzin and Lincoln (1994) suggest that inherent in the definition of qualitative inquiry is the construct of naturalism. Naturalistic inquiry is, therefore, a *paradigm of inquiry* within qualitative research methods. That is, “naturalistic inquiry is a pattern or model for how inquiry may be conducted to include carrying out research in a natural setting, probing the nature of reality (naturalism)” (Guba & Lincoln, 1982, p. 233), thereby obtaining multiple, intangible realities which can only be studied holistically. The core of this inquiry probes how people make meaning of their experiences where they live and work. Put another way, to understand a complex phenomenon, you must consider the multiple realities experienced by the participants themselves (Suter, 2012, p. 344). Philosophy is the primary field of origin for naturalism.

The concept of meaning-making leads us to consider the constructivist label, also associated with qualitative and naturalistic research (Lincoln & Guba, 1985). Given that the constructivist approach views knowledge not as the objective truth but as constructed realities, these constructed realities can differ and generate “a richer and deepened” understanding of the phenomena in question (TalkadSukumar & Metoyer, 2019, p. 1–2). In other words, the qualitative approach is synonymous with constructivism, focusing on interpreting and understanding a social construction of meaning in a natural setting (Guba & Lincoln, 1982; Kamal, 2019). The philosophical underpinnings of constructivism originate with psychology, anthropology, culturalism, and field studies.

We have described the qualitative, naturalistic, and constructivist underpinnings as interconnected frameworks. Yet, if we look for a single definition of ‘qualitative,’ we look in vain (Aspers & Corte, 2019). At its core, qualitative research remains a multifaceted, naturalistic approach grounded in each individual’s social construction of reality.

A Narrative by Any Other Name?

Narrative data are the foundation of qualitative research; these data comprise the stories, perspectives, and experiences shared via the voices and writings of participants. On the other hand, narrative research designs comprise the synthesis of individual stories reflecting an event or life story chronologically or thematically constructed by the researcher. The design focuses on one or two key individuals within the context of their social, cultural, familial, professional, educational, and private worlds (Clandinin, 2013; Gee, 1991; Riessman, 2008). Thus, narrative designs may include narrative data, but including narrative data in your study does not, on its own, qualify it as a narrative research design.

Phenomenon, Phenomenology, Phenomenological

All qualitative research embodies the study of phenomena, which is exploring the natural world. Phenomenon comes from the Greek, meaning to flare up, show itself, or appear. References to studying phenomena originate with Plato, Socrates, and Aristotle.

Phenomenology is a philosophical school of thought that emphasizes people’s subjective experiences and interpretations of the world. The phenomenologist wants to understand how the world appears to others, predicated on the belief that one’s experience must be transcended to discover reality (Arp, 2004; Moustakas, 1994; van Manen, 2014).

In the early 20th century, Edmund Husserl sought to understand human consciousness and the ‘whatness of things.’ He believed that the essence of consciousness is intentionality, which points to something that must include the individual’s emotional interpretation, physical or bodily awareness, perceptions of self and others, and perceptions of social interactions (Arp, 2004; Pivcevic, 2013). Husserl’s philosophical stance emphasized the consciousness of the human experience directed at the duality between what individuals “see” as opposed to what things “mean” (Husserl, 1970).

The distinction between phenomenology and phenomenological research rests with the methodological application of the latter. Moustakas (1994), considered the father of modern phenomenological research, reinterpreted the original philosophy of phenomenology, believing that researchers should probe the ‘wholeness of an experience’ in the quest for the essence of that experience. This approach focuses on people’s perceptions of the world in which they live and what it means to them as their ‘lived’ experience, known as the essence or the core meaning of that experience. Therefore, the primary objective of a phenomenological study is to explicate the meaning, structure, and essence of the lived experience of a person or a group of people around a specific phenomenon, one that is shared by and with them in the natural world (Beck, 2019; Moustakas, 1994; van Manen, 2014).

While all qualitative research focuses on phenomena, and phenomenology is the philosophical framework for understanding the existential exploration of an individual’s subconscious life, phenomenological research designs explicitly focus on the essence of the lived experience, grounded in a shared human condition.

Purposive Versus Purposeful Sampling

This is an easy one...there is no difference between purposive and purposeful sampling, except for their origins (Patton, 2015). Both connote that participants are selected as ‘information-rich cases’ and are intentionally chosen because they are deemed to possess essential insights into the phenomenon under study. In many instances, purposive and purposeful are used interchangeably, sometimes within the same narrative (see Patton’s explanation for using both terms interchangeably, p. 264). Patton intentionally chooses the designation of ‘purposeful’ over ‘purposive’ regarding qualitative sampling; other scholars who prefer ‘purposive’ over ‘purposeful’ include Polkinghorne (2005), Holland and Shaw (2014), and Abrams (2010). This distinction is, then, a case of semantics and academic preference; it depends on your own point of reference.

Qualitative research is almost always conducted on purposeful or purposive samples; subsequent strategies are then applied under that umbrella of purposeful/purposive selection (Patton, 2015, pp. 266–272). Moreover, sampling of research participants in qualitative research is described as purposeful or purposive because there is far less emphasis on generalization from sample to population and greater attention to the sample purposely selected for its potential to yield insight from its illuminative and rich information sources (p. 264). Thus, studying information-rich cases yields insights and in-depth understanding rather than empirical generalizations (p. 265). Essentially, information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the inquiry, hence ‘purposeful’ sampling.

Participants, Actors, Key Informants... Oh, my!

Participants are individuals intentionally selected so that researchers may obtain robust information to answer a research question. The composite of participants’ unique stories, perspectives, and experiences forms the basis for a deeper understanding of the phenomenon under study. The participant elaborates on the interviewer’s/moderator’s questions and develops a social relationship with that researcher, meaning that individuals ‘participate’ in the intimate, close exchange with the researcher. The

qualitative research participant is thus labeled “participant” because their role goes beyond simply replying to a series of questions to encompass participation in the research on many levels.

Actors are essentially the same as participants but describe those who play a part in a narrative analysis, a role in a dramatological, cultural, or political scenario, or even as a member of a participatory action research project (Burke, 1969; Flink et al., 2012; Riessman, 2008). These individuals may represent political activists, community members, government officials, or other types of ‘players.’ Still, participants and actors perform the same function in a qualitative study, i.e., to participate, engage, and interact with the researcher or observer.

Key informants differ functionally from participants and actors. Ethnographic interviews (Fetterman, 2019; Spradley, 2016) are primarily conducted with select individuals known as key informants. The value of depending on a few of these particular participants is that their first-hand perspectives provide a lens through which the researcher can better understand the group without having to interview, observe, and engage with every cultural group member. As noted by Wolcott (2008), the three main reasons for using the unique insights and information gleaned from key informants include 1) gathering needed information efficiently, 2) gaining access to that information which would otherwise be unavailable, and 3) gaining a particular interpretation of the culture from a critical insider.

These informed individuals are important linkages in an ethnographic study, helping the researcher access the inner workings of the culture based on their pivotal role within the group. They possess first-hand knowledge of the phenomena under study and provide intimate perspectives; they also provide contextual details of the place, time, setting, and cultural artifacts relative to the lives of other participants. Spradley (2016) describes the key informant as presenting a unique connection to their cultural group, emphasizing that the informant is willing to share information with the researcher by virtue of their unique relationship.

Conducting a Depth or In-Depth Interview?

There is no difference between depth and in-depth interviews, although both terms are used in the qualitative research literature. If you are an anthropologist or field researcher, you are more likely to use the term ‘depth interview’ compared with social scientists in other fields who tend to use the term ‘in-depth.’ Either way, depth or in-depth interviews involve a questioner and one or more interviewees to probe the interviewees’ ideas about the phenomenon of interest (Rubin & Rubin, 2013). Both terms mean that the interaction between researcher and participant is intimate, narrative, expressive, and based on an evolving relationship.

Follow-Up Questions, Second Questions, Probes, and Prompts: Same Intention, Different Labels

This category of terminology presents a murky realm for qualitative interviewers. While these terms may seem similar—and, in many instances, are used interchangeably—they can be defined differently. Typically, qualitative researchers use probes to encourage interviewees to elaborate and clarify their initial response to an interview question (Patton, 2015; Rubin & Rubin, 2013; Warren, 2002). In fact, many experts recommend specific types of probing questions (e.g., continuation, elaboration, attention, clarification, steering, slant, and sequence) (Rubin & Rubin, 2013; Spradley, 2016). Some experts prefer the use of ‘prompt’ to help interviewees recall a detail or memory, meaning something different from probing. Kvale and Brinkmann (2009), Seidman (2006), and DiCicco-Bloom and Crabtree (2006) use the term ‘second questions’ to describe intentionally crafted follow-up questions; similarly, ‘follow-up questions,’ as a separate term, are also defined as interview questions that evolve organically from the participant’s story, focusing on a participant’s words or phrases that require further explanation (Rubin & Rubin, 2013). All these definitions reinforce the fundamental activity: they are devices used to encourage interviewees to elaborate on their interview responses. Slight variations may distinguish them, but they all speak to the same fundamental activity.

SPONSOR, 2022 NERA CONFERENCE



Expanding opportunities for every learner

Learn about us at cognia.org

© 2022 Cognia, Inc.



The AAMC Strengthens the World's Most Advanced Medical Care

Representing institutions that deliver the world's most advanced medical care, the AAMC provides programs and services that support the entire spectrum of education, research, and health care. We believe in medical education that prepares physicians and scientists to meet the nation's evolving health needs, support a diverse and culturally competent health care workforce, lead medical advancements that prevent disease and alleviate suffering, and more.

The AAMC and its member institutions are dedicated to developing tomorrow's doctors and tomorrow's cures.

Learn more at aamc.org.



Listen and subscribe!

The award-winning "Beyond the White Coat" podcast series dives into issues affecting the academic medicine community at large, while also highlighting the important work happening in America's medical schools, teaching hospitals, and the communities they serve. [Explore the AAMC podcast designed for medical professionals.](#)

The Path to Positioning: Bracketing and Epoche

Researcher positionality is essential. As the facilitator of an exchange with a participant, the researcher has a responsibility to be transparent and authentic and fully disclose their background as it pertains to the focus of the study. When the researcher asserts their ‘position’ with participants to make room for their voices and experiences, they create new assumptions about the phenomenon in question. In this way, the researcher intentionally allows participant views to dominate until their views surpass what the researcher *thinks* they are hearing or interpreting.

The roots of this practice originate with Husserl’s notion of bracketing (1970), meaning ‘putting aside’ or bracketing out the world, followed by Moustakas’ practice of epoche (1994), meaning the researcher stands back and suspends judgment as they reduce the essence of the phenomenon. Further, epoche is a process in which the researcher engages to remove or at least become aware of prejudices, viewpoints, or assumptions regarding the phenomenon. This suspension of judgment and preconceived notions is an intentional positioning stance by the researcher. Bracketing and epoche have become standard qualitative research practices but are most often used in phenomenological studies (Husserl, 1970; Moustakas, 1994).

In both cases, the researcher attempts to acknowledge their personal bias, eliminate personal involvement with the subject under study, and identify preconceptions. It is about adjusting one’s attitude, called a phenomenological attitude. In other words, the researcher must develop a mindset that positions them to obtain rich descriptive participant narratives and offset their own assumptions about what they think participants mean or what they think they already know (Giorgi, 1994; Moustakas, 1994; Patton, 2015).

Speaking of Researcher Positionality? The Role of Reflections and Reflexivity

There is an important difference between reflection and reflexivity. While many people use these terms interchangeably, they are not the same in practice or concept.

Reflection asks a participant to reflect on a topic, usually following a prior exchange between the researcher and the participant. This practice is typically oriented toward the participant’s practice(s) and can be labeled as “What do you think you know...and why?” When soliciting a participant’s reflection of any type, the researcher asks that individual to review, reconsider, process, clarify, or debrief an earlier conversation, interaction, or even written documentation of an experience (such as journaling or keeping a diary). This process requires the researcher to provide an intervention of some kind to help the participant structure that reflection. It is a researcher-prompted but participant-generated practice. Reflections can provide essential data for a study (Billups, 2020).

On the other hand, reflexivity is when the researcher considers their critical self-reflection on their bias, predispositions, and preferences as they enter the research field or review their notes and transcripts after data have been collected. This practice can also involve the consideration of the research process and the ways the project has evolved, including all relationships, procedures, external factors, internal influences, and a process for description, interpretation, re-orientation towards the phenomenon under study, and the completeness of the ‘story’ (Suter, 2012). It is the process of asking oneself how ‘you know what you know...?’ (Creswell & Poth, 2018; Patton, 2015). Reflection is inherent in the practice

of reflexivity, but reflexivity exceeds reflection in scope and purpose. Thus, reflexivity is a researcher-generated practice; reflexive by-products contextualize research findings but do not constitute data collection in any way.

What Does ‘Researcher As Instrument’ Really Mean?

This phrase has been misapplied to the point that it loses its meaning in many qualitative discussions. Denzin and Lincoln (2003) suggested that researchers must be skilled at observing, recording, coding, and listening to what others say about their experiences. In this way, they imply that the researcher serves as a conduit or pathway to the actual data collection instruments and process.

In a qualitative study, the proximity between researcher and participant is close and personal. The researcher-as-instrument is actually a reflection of the distance between the researcher and the participants, documents, or other data sources. A relationship is naturally established when there is a connection between two individuals, especially when one seeks personal information from the other. Engaging the participant, connecting with the individuals at a research site, and/or living with participants leads to deep engagement and rapport.

Still, data collection must go through the researcher and the researcher’s cadre of instruments. This process infers that the emotional, physical, and cognitive distance between the researcher and study participants must be close enough to make data collection appear seamless. The researcher then becomes merged with the tools they use to collect their data. Ultimately, researcher-as-instrument should not be taken literally but conceptually to reflect the evolving connection between researcher and participant as data are collected (Billups, 2020).

Summary

This overview of qualitative terminology provides a foundation for the next two articles in this series. Part II builds on this discussion regarding qualitative sampling and explains its interconnected elements; Part III elaborates on this article’s overview of the researcher’s positionality and describes how a researcher positions themselves through bracketing/epoche, reflexivity, ethical considerations, and the acknowledgment of inherent bias in qualitative projects.

References

- Abrams, L. S. (2010). Sampling ‘hard to reach’ populations in qualitative research: The case of incarcerated youth. *Qualitative Social Work*, 9(4), 536–550.
- Arp, R. (2004). Husserl, the transcendental and the mundane. *Journal of the British Society for Phenomenology*, 35(2), 168–179.
- Aspers, P., Corte, U. (2019). What is qualitative in qualitative research? *Qualitative Sociology*, 42, 139–160.
- Beck, C. T. (2019). *Introduction to phenomenology: Focus on methodology*. Sage.
- Billups, F. D. (2020). *Qualitative data collection tools: Design, development, and applications* (Vol. 55). Sage.
- Burke, K. (1969). *A grammar of motives* (Vol. 177). University of California Press.
- Clandinin, D. J. (2013). *Engaging in narrative inquiry*. New York, NY: Routledge.
- Creswell, J. W., & Poth, C. N. (2018). *Qualitative inquiry and research design: Choosing among five approaches*, (4th ed.). Sage.
- Denzin, N. K., and Lincoln, Y.S. (1994). *Handbook of qualitative research* (eds.). Thousand Oaks, CA: Sage.

- Denzin, N. K., & Lincoln, Y. S. (2003). Methodological issues in the study of social problems. In G. Ritzer (Ed). *Handbook of social problems: A comparative international perspective*, (pp. 30–46).
- DiCicco-Bloom, B., & Crabtree, B. F. (2006). The qualitative research interview. *Medical Education*, 40(4), 314–321.
- Fetterman, D. M. (2019). *Ethnography: Step-by-step*. Sage.
- Flink, M., Hesselink, G., Pijnenborg, L., Wollersheim, H., Vernooij-Dassen, M., Dudzik-Urbaniak, E., Orrego, C., Toccafondi, G., Schoonhoven, L., Gademan, P. J., Johnson, J. K., Öhlén, G., Hansagi, H., Olsson, M., Barach, P., & HANDOVER Research Collaborative. (2012). The key actor: A qualitative study of patient participation in the handover process in Europe. *BMJ Quality & Safety*, 21(Suppl 1), i89–i96.
- Gee, J. P. (1991). A linguistic approach to narrative. *Journal of Narrative and Life History*, 1(1), 15–39.
- Giorgi, A. (1994). A phenomenological perspective on certain qualitative research methods. *Journal of Phenomenological Psychology*, 25(2), 190–220.
- Guba, E. G., & Lincoln, Y. S. (1982). Epistemological and methodological bases of naturalistic inquiry. *Educational Communication and Technology Journal*, 30(4), 233–252.
- Holland, S., & Shaw, I. (2014). *Doing qualitative research in social work*. Sage.
- Husserl, E. (1970). *The crisis of European sciences and transcendental phenomenology: An introduction to phenomenological philosophy*. Evanston: Northwestern University Press.
- Kamal, S. S. L. B. A. (2019). Research paradigm and the philosophical foundations of a qualitative study. *PEOPLE: International Journal of Social Sciences*, 4(3), 1386–1394.
- Kvale, S., & Brinkmann, S. (2009). *Interviews: Learning the craft of qualitative research interviewing*. Sage.
- Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic inquiry*. Sage.
- Maxwell, J. A. (2013). *Qualitative research design: An interactive approach*. Sage.
- Moustakas, C. (1994). *Phenomenological research methods*. Sage.
- Patton, M. Q. (2015). *Qualitative research & evaluation methods: Integrating theory and practice*, (4th ed.). Sage.
- Pivčević, E. (2013). *Husserl and phenomenology*. Routledge.
- Polkinghorne, D. E. (2005). Language and meaning: Data collection in qualitative research. *Journal of Counseling Psychology*, 52(2), 137–145.
- Riessman, C. K. (2008). *Narrative methods for the human sciences*. Sage.
- Rubin, H. J., & Rubin, I. S. (2013). *Qualitative interviewing: The art of hearing data*, (3rd ed.). Sage.
- Seidman, I. (2006). *Interviewing as qualitative research: A guide for researchers in education and the social sciences*. Teachers College Press.
- Spradley, J. P. (2016). *The ethnographic interview*. Waveland Press.
- Suter, W. N. (2012). Qualitative data, analysis, and design. In W. Newton Sutter (Ed.), *Introduction to educational research: A critical thinking approach*, (pp. 342–386).
- TalkadSukumar, P. & Metoyer, R. (2019). Replication and transparency of qualitative research from a constructivist perspective.
- Van Manen, M. (2014). *Phenomenology of practice: Meaning-giving methods in phenomenological research and writing*. Taylor & Francis.
- Warren, C. A. (2002). Qualitative interviewing. In J. F. Gubrium & J. A. Holstein (Eds.), *Handbook of Interview Research: Context and Method*, Sage. (pp. 103–116).

NERA

NORTHEASTERN EDUCATIONAL
RESEARCH ASSOCIATION



(<http://kaplan.com/>)

Kaplan (<https://kaplan.com/>)

UConn

NEAG SCHOOL OF EDUCATION

(<http://www.education.uconn.edu/>)

University of Connecticut (<http://www.education.uconn.edu/>)



THE AMERICAN BOARD OF SURGERY

Promoting surgical excellence since 1937

The American Board of Surgery serves the public and the specialty of surgery by providing leadership in surgical education and practice, by promoting excellence through rigorous evaluation and examination, and by promoting the highest standards for professionalism, lifelong learning, and the continuous certification of surgeons in practice.

www.absurgery.org | @AmBdSurg | www.facebook.com/AmBdSurg
1617 John F. Kennedy Blvd., Suite 860 | Philadelphia, PA | 19103 USA



© 2021 College Board.

We clear the path to college.

It's our mission to make sure every student who wants to go to college has a clear path to get there. So everything we offer—from classes to tests to scholarships—is all about giving more students more access to more opportunities.

collegeboard.org

 CollegeBoard