

The NERA Researcher

The President's Message



Dear NERA Members,

As you begin reading this issue of the Researcher, it is important to note that it is presented in a new medium, Canva. After the 2023 conference program was produced in a similar fashion, thanks to our Board liaison Jade Caines Lee for working with previous co-editors Barbara Helms and Michael Wolter to help transition this fine publication into a new era. The editorial board now includes Elizabeth Stone, Kat Tremblay, and Maura O’Riordan, with Barbara providing continued guidance. We hope this new approach brings you an even more enjoyable reading experience.

Moving on, I extend my sincere appreciation to those who have helped make NERA a stronger organization through their service. First and foremost, congratulations to Past President Bo Bashkov and the 2023 conference team of Sarah Ferguson, Mina Lee, Francis O’Donnell, and Maura O’Riordan for their exceptional management of our highly attended marquis event this past October. I want to welcome Sarah to the Executive Committee as our new Secretary, succeeding Katrina Roohr who did an amazing job in this role. I am equally delighted to have Tricia Clarke as the new GSIC chair and welcome Beth Perkins and Brian Leventhal to the Board of Directors, with thanks to Matthew Speno, Tabitha Bellamy, and Steven Holtzman for their previous service to the Board. Special thanks also go to those stepping down from committee leadership roles: Carol Barry, Tajma Cameron, Nina Deng, Tia Fechter, Bethany Fishbein, Nikole Gregg, Rory Lazowski, Salika Lawrence, Jennifer Randall, and Kerry Vieth.

Winter in the Northeast can be particularly brutal at times. The

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The NERA Researcher

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

Message from the Editors

Happy 2024 NERA friends,

As we begin another year of the NERA Researcher, I would like to take the opportunity to introduce you to the new NERA Researcher Editorial Board. As most of you may remember, there have always been two editors: content and production.

Thanks to the Board of Directors and our liaison, Jade Caines Lee, the two-editor model has been replaced by an editorial board: Liz Stone, Maura O'Riordan, Kat Tremblay, and me (Barbara Helms). I am so happy to welcome Liz, Maura, and Kat. They have stepped up and made great modernizing changes that we hope you will all like.

We want to take the opportunity to extend our deep appreciation to the authors of the reports and articles included in this issue and all the issues of the Researcher. While we did not have the opportunity to thank each of them individually, we want to do so here. Timely submissions greatly help us get everything reviewed and ready for publication by the deadline.

This issue has lots of interesting information, such as the 2024 conference overview and the second very interesting article on qualitative research by Felice Billups. Be sure to check out the 2023 award winners and consider nominating yourself or others for the 2024 awards (see the nomination instructions for each award). We encourage members to submit any news they have year-round. Any news received will be published in the next issue.

We also want to point out a new feature, the Member Spotlight, with which we hope to highlight two members per issue. We are interested in volunteers of all NERA membership lengths. In our inaugural issue, we learn more about two of our Editorial Board members. Information about how you can be part of the feature is included with the Member Spotlights.

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combination of the cold, the bad weather, and the long dark nights might make it difficult for some people to concentrate on setting personal and professional goals as a new year begins. As a third-generation early riser, I have a slightly different perspective on the darkness that greets me most mornings when I wake up. I get excited for the first light to break out across the horizon in my living room. To me, it represents hope for the day ahead and the possibilities to help make the world a better place.

This year, in serving as your president, the winter season takes on additional significance. My conference team of Javier Suárez-Álvarez, Caroline Prendergast, Hannah Smith, and Siyu Wan and I are actively working to establish a strong foundation for our 55th annual conference taking place October 8 – October 10 in Trumbull, Connecticut around the [theme](#), “*Promoting Social Responsibility in Education Research*”. However, I also feel the responsibility to convey how this theme aligns with my goals for NERA this year. President Franklin Roosevelt used the medium of radio to relate to the American people about important issues, in what became known as fireside chats. While I will not be able to directly address you until the conference, please indulge me at this time through the *Researcher* to talk to you now. In the spirit of the fireside chats, please feel free to grab a blanket or a warm beverage and join me by the fire before you read further.

For the last three years, the effects of the pandemic on education and educational research needed to be in focus by our community in our work and collective dissemination strategy. With the pandemic’s impact gradually receding, I see the 2024 conference as an opportunity for the NERA community to take a collective breath and reflect very carefully on three key aspects: people, process, and policy. We must remember the individuals for whom we conduct our studies, those who stand most to benefit from our research (people), the approaches and methods we employ (process), and the reasons why we do the work and the impact it has on the field (policy).

These principles are not only reflected in our conference theme but can also serve as pillars on which the NERA organization can solidly stand. For those who may not remember or be aware, almost a decade ago, the NERA Strategic Plan was developed with the following seven goals:

Member News

Rachel Satter, EdD, successfully defended her dissertation in December 2023 titled “Development and Psychometric Validation of an Instrument to Measure Social-Emotional Learning and Competency for Pre-Service Teacher Candidates” at the University of Bridgeport. Rachel designed and validated an instrument, the Satter Pre-Service Educators Social-Emotional Competencies Inventory (Satter PSESEC-I), to allow student teachers to self-assess and reflect on their abilities to use SEL/SEC in their instructional practice.

Maura O’Riordan, Ph.D., 2023 Program Co-Chair, shared the following [post](#) on LinkedIn: “One year ago, I defended my dissertation. Time has flown both personally and professionally since then! Today, I want to share the [link](#) to my dissertation. I looked at whether a text-to-speech accessibility feature improved test-taker engagement for special education students and non-special education students. Spoiler alert: The biggest takeaway was that special education students were less likely to be engaged than their peers, regardless of whether or not they had access to text-to-speech. This research furthered my feeling that (unsurprisingly) to improve testing for all; ALL LEARNERS need to be considered in the development process. I continue to care deeply about how to create and use accessible, fair, and equitable tests for all learners... but I sure am glad to be done with my dissertation!”

Please consider submitting your professional accomplishments to *The NERA Researcher* for recognition! News can be submitted year-round to theneraresearcher@nera-education.org and will be published in the next issue.

Goal 1: Support and promote high quality Educational Research.

Goal 2: Keep members up to date on emerging trends and issues in the field of educational research.

Goal 3: Develop and nurture the future leaders of the field of education, and encourage current leaders to interact with and mentor junior NERA members.

Goal 4: Maintain an effective, financially viable professional organization with inclusive governance.

Goal 5: Purposely cultivate leadership.

Goal 6: Begin formal outreach to other professional organizations.

Goal 7: Increase internationalization and/or broaden stakeholder (e.g., state and district leaders) participation in NERA.

Each of these to me has relevance to people, process, and policy. Being given the opportunity to serve NERA as a conference co-chair in 2021 after previously running two committees, I knew there was more that I could do to serve this organization. After joining the Conference Ambassadors in 2022, I decided running for executive office was the logical next step. Now as NERA president, my focus is on how to continue supporting our Strategic Plan. I will have more to say about this in the coming months.

In closing this article, as I mentioned in my [welcome message on the NERA website](#), faith is one of the cornerstones of my philosophy. As we embark on 2024 and plan for our 55th annual conference, I relate the following rabbinic teaching that represents what this gathering means to me. When a person turns 50 years old, they are fit to offer counsel, drawing on life experience and intellect, and when a person turns 60 years old, they reach mature status (a nicer way of saying old age), such that it can refer not just to physical appearance, but intellectual maturity (Ethics of the Fathers 5:25).

The NERA membership represents a rich mix of experiences and knowledge and we always should look to them for advice, to teach us new things, and to reach new intellectual and personal heights. Their wisdom comes not just from their minds, but also from their hearts. It is in that vein that I urge you to keep NERA in mind, particularly when engaging on social media. Spreading awareness through our [Facebook](#), [LinkedIn](#), and [Instagram](#) pages about the exceptional experiences we provide and the great stories our members have to tell is crucial to maintaining a strong membership and to attracting newcomers to NERA.

I am hopeful that the warmth generated from our work will allow for the cold and dark of winter to transition quickly into the warmer and brighter days of spring and summer, so that together we can help make this a truly remarkable year for the NERA organization.

Best to you all,

Jonathan Steinberg

2023-2024 NERA President



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2023 Presidential Address

Together we can!

Shaping the future of education using effective and equitable technology

Bo Bashkov

IXL Learning

As a basic human right, education has the remarkable ability to profoundly shape lives, allowing people to transcend boundaries, reach new possibilities, and realize their full potential, both on a personal and societal level. Drawing on my own educational journey and my experience as an education research professional, I will delve into the near-future landscape of education, where teachers and learners alike rely on educational technology that is not only highly effective and efficient, but also safe, secure, and equitable.

There is a lot going on in the world right now. On this planet of weather and climate extremes, geo-political conflicts and outright war in some parts of the world! Post-pandemic and pandemic-agnostic health and well-being challenges, various hurdles in many other aspects of our lives persist. Education alone has so many challenges and opportunities. Before I dig into some of those challenges, let me share a little bit about me and how I got here.

I was born in Bulgaria and grew up in a small village in the mountains, just 5 miles north of Greece. My parents had animals and worked the fields, growing anything from veggies to fruits, from potatoes to tobacco. My father never went to middle school or beyond. My mom didn't go to high school, and my brother barely finished high school. So my chances of a good education or a prosperous career were slim, to say the least.

One morning, when I was six years old, I woke up to an unexpected present—the Bulgarian ABC book that first graders use to learn how to read. It was one of the happiest days of my life. I was so excited; I couldn't put this little book down. A few months later, I surprised my mom by reading the words in an old newspaper we used as wrapping paper in the kitchen. By the time I was in first grade, I could read and do basic math problems.

But learning how to read Bulgarian is not that hard because it's a phonetic language. We invented the Cyrillic alphabet and made it user-friendly: you pronounce each letter as it's written. Learning how to read English, on the other hand, is not that easy. But as a second or third language, it's actually not that bad.

Pop-culture and social media get a bad rep these days, but at one point in time they allowed me to learn about other cultures through music, shows, and movies and instilled in me a desire to learn how to speak other languages—which would eventually allow me to get to know other cultures first-hand.

I took a psychology course in high school, and got really into it. With my newly discovered passion for psychology, my love for languages, and my fervent desire to see the world, it was a no-brainer: I wanted to pursue higher education abroad. The problem was, studying abroad was not that common in my provincial school, especially pursuing a college career in the U.S. We didn't have school counselors or academic coaches to tell us how the application process works. But I was determined. I talked to one or two students who had taken this route, one teacher who doubled as an authorized translator and provided some guidance outside of school, and I went for it. I think the TOEFL and the SATs definitely worked in my favor, and my wish came true. I got into four schools in the U.S. and the American University in Bulgaria, which was actually the only one I could afford to go see on Open House day.

But I ended up going to one I didn't see—Berea College in rural KY—the first integrated and co-educational college in the South, where every student works part-time to pay for room and board, but is guaranteed free tuition. A college in the middle of nowhere wasn't exactly in my plans, but it was a good college I could actually afford. And so what if it was in a country I had never stepped foot in before?! I hadn't traveled anywhere outside of Bulgaria anyway. And work didn't scare me—I had plenty of practice juggling work and school growing up.

So 17 years ago I moved to the U.S., leaving all my family and friends behind, not knowing a single person here, to go to college. I made friends, I built relationships with faculty and classmates, I learned how to country dance, and I got into stats and research methods. Thanks to my TA and dear friend, Megan Rodgers Good, I joined a summer research project with our advisor, Dave Porter, and that landed us a conference presentation and a visit to James Madison University (JMU) in Virginia. And that's when we met Sara Finney and learned about educational research as a field. At JMU, I was lucky to work with Sara, Christine DeMars, Dena Pastor, Debbi Bandalos, and many others. I learned about quantitative methods, how to write and publish, how to present—basically everything you need to kickstart a successful career in educational research and measurement.

Barely a year after joining JMU, Sara said, "You're going to NERA..." to learn about what jobs and careers look like in the field and start building a professional network. So I got involved with NERA early, and this community has had such a positive impact on me and my career. I met new people, many of whom later became my mentors, supervisors, coworkers, coauthors, and longtime friends. So when Past President Ross Markle invited me to run for President, I knew I had to say yes. I loved serving NERA in my previous roles, working, and communicating with so many brilliant people and getting to know them better. It's such a special community we have!

I always leave NERA slightly exhausted, yet so energized with ideas and all the new knowledge and wisdom I've acquired by taking a higher perspective on things, realizing how everything is connected, seeing the larger, far-reaching impact of our work on society, and also

getting inspired to figure out how we can do things even better. There are so many challenges in education today. Let's take a look at where we are with some of them, and where we want to go. Let's begin to answer the question *"Where do we go from here?"*

The 2022 NAEP report card revealed that only 37% of fourth-graders nationwide are proficient in math and only 33% are in reading (NAEP, 2022a; 2022b). Meanwhile, a national survey by Learning Heroes (2023) found that 9 in 10 parents believe their child is at/above grade level in both math and reading, with 80% of parents believing they have a clear picture of how their child is doing academically. So what's the disconnect here? That's a 50-point difference between parents' perceptions and reality!

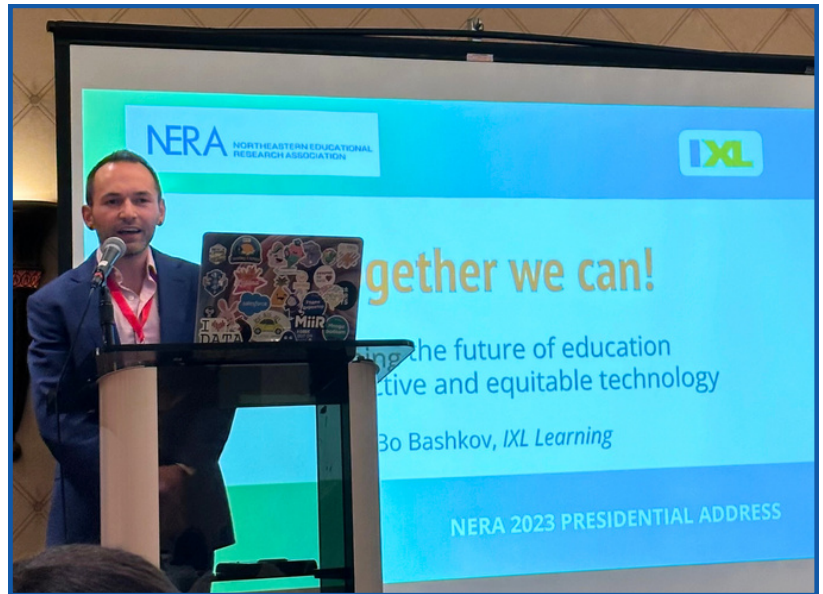
And part of it is what parents are seeing at home—their kids bring As, and Bs, and Cs, but when it comes to their core learning and readiness for upper grades and beyond, those grades don't really matter.

Some would argue that worse performance in the moment is actually better for long-term academic success. Cognitive science research certainly supports this idea. But how do you explain that to a parent? It feels counterintuitive. How do you explain it to a child who just wants to do well and be told they are doing well? It's tough, but we have to figure it out.

Two-thirds of fourth-graders are struggling readers. This is a huge problem! In elementary education, it is well known that up until third grade you learn to read. After that, you read to learn. Because reading is what? FUNDAMENTAL! With most students behind in reading by fourth grade, how are they to excel in middle and high school?

Obviously, many educators are grappling with this. Many states are ditching old curricula based on the idea of balanced literacy—or developing a love of reading first and reading fluency later—and embracing the science of reading: direct, explicit, and systematic instruction on phonemic awareness (or the sounds of English), phonics (sounding out letters), then blending sounds, and so on; not just memorizing what entire words should sound like when read aloud.

More than 20 years ago, the National Reading Panel stated that these strategies are fundamental to developing early literacy and should not be expected of early readers to master organically. So why is it taking so long for this pedagogy to go mainstream? Well, first—teachers typically don't choose their own curricula. These decisions are usually made at the



Continued on page 46



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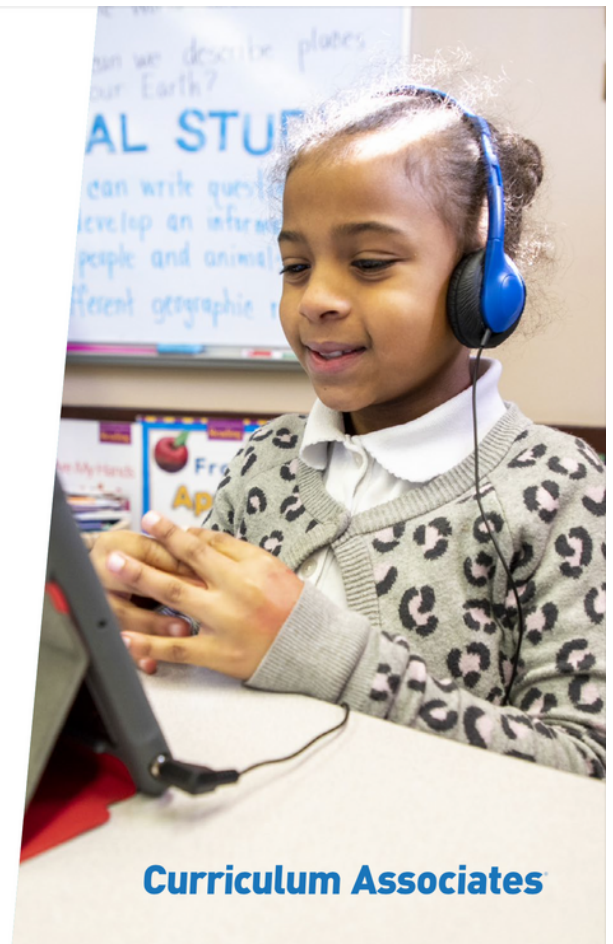
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2023 Conference Report and Highlights

Greetings once more from the 2023 NERA conference team! We hope you are all beginning 2024 on a positive note, and that you still have fond memories of your NERA 2023 conference experience from this last fall. We want to thank everyone who attended, volunteered, presented, and/or contributed in other ways to the conference. NERA only exists due to the work and contributions of our community, and as we close out our term as conference co-chairs, we are happy to share this final conference report with all of you!

With our theme of *Where Do We Go From Here? Shaping the Future of Education Together*, the NERA 2023 program consisted of more than 110 proposals presented as papers, symposia, posters, and panels across 30 sessions throughout the three days. Altogether, we had 244 registrants at the conference in 2023, many of them attending for the first time, resulting in one of our largest conferences in recent years.

The keynote presentations by Dr. Jamila Lyiscott (a.k.a., Dr. J) and Dr. Fabienne Doucet were thought provoking and inspiring, and well aligned with the theme of the conference. The Presidential Address by our own Dr. Bo Bashkov was motivating and timely, leaving us with a charge to consider where we go from here as education researchers. The pre-conference and in-conference workshops were on unique and interesting topics, and were well attended by the membership. Similarly, the social events throughout the conference, from 3MT to Karaoke, GSIC to Mentoring, were all great spaces for networking and connection with NERA colleagues!

NERA is a volunteer-run organization, and we depend on both our membership and our sponsors to bring this conference to the community each year. We wish to thank all of our sponsors who contributed a total of \$30,800 in support of the 2023 conference! We also want to thank the members who contributed an additional \$435 in personal donations. We are pleased to report that we exceeded budget expectations and came in above conference expenses, while still providing an engaging and meaningful conference experience for attendees.

As we close out our work as conference co-chairs and hand things over to the 2024 team, we want to thank you all once again for your support and participation in NERA 2023. We wish you all a productive year shaping the future of education research together, and we look forward to seeing you back in Trumbull, CT for NERA 2024!

Francis O'Donnell, Maura O'Riordan, Mina Lee, and Sarah Ferguson
2023 NERA Conference Co-Chairs









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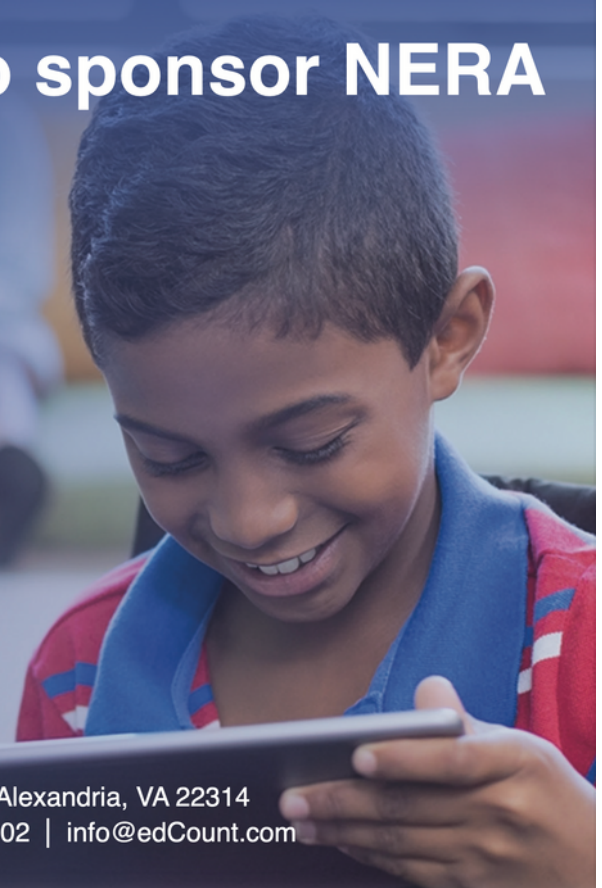
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2024 NERA Conference Announcement

Tuesday, October 8–Thursday, October 10, 2024
Trumbull Marriott Shelton, Trumbull, CT

Javier Suárez-Álvarez, Caroline Prendergast, Hannah Smith, and Siyu Wan

Dear NERA Members,

We hope you are having a great start to the year. With great pleasure, we extend a sneak peek into the preparations for our upcoming conference. We are eager to begin sharing some of the details of this year's conference. First, we express our utmost gratitude for being accommodating with the adjusted conference schedule. Please ensure you put **Tuesday, October 8–Thursday, October 10, 2024** on your calendar, and do not hesitate to let us know how we can help you plan for this year's conference. We appreciate everyone's collaboration and commitment to making NERA the best educational research conference in the Northeast, from Maine to Virginia, and beyond.

Promoting Social Responsibility in Educational Research

In the ever-changing world of education and educational research, we need to continually reflect upon the fundamental reasons for our work in the field of education and the responsibilities that come with it. We need to remember that **we serve learners of all types**. Our roles require us always to question the status quo with clear intent; collaborate with diverse groups of people representing different races, ethnicities, gender identities, cultural backgrounds, expertise, and experiences; ensure we collect the appropriate data from the appropriate constituencies while **embracing and promoting intersectionality**; be explicit about the methods we use; and openly and transparently communicate the results we find, whether these are significant, not significant, or inconclusive. Our ability to succeed depends on continuously working to maintain strong and healthy communities of practice, **ensuring all stakeholders' voices are heard and represented** so that we support positive changes both in the field of education research and in society as a whole. Let us join together in this journey of rediscovery and recommitment to our shared values and mission as an organization.

We will particularly encourage proposals for workshops, papers, posters, and other sessions that accept these challenges and embrace social responsibility in research through a diversity, equity, inclusion, and justice (DEIJ) lens. We are excited to share our two amazing keynote speakers who significantly contribute to this mission.

2024 NERA Conference Announcement - Keynote Speakers



Beverly Leon is the founder and CEO of Local Civics and was named to the Forbes Under 30 Social Impact List in 2022. She is also a social entrepreneur and former professional soccer player.



Shaun Nelms is Professor and William & Sheila Konar Director of the Center for Urban Education Success in the Warner School of Education at the University of Rochester.

The Call for Workshops will be released first, and the Call for Conference Papers, Posters, and Symposia will follow soon after. We hope you will submit your research and coordinated sessions in alignment with the following preliminary content strands:

1. Diversity, Equity, Inclusion, and Justice
2. Educational Research Methods
3. Educational Policy Challenges
4. Higher Education Research and Practice
5. Measurement and Psychometrics
6. PK-12 Education Research and Practice
7. Post-COVID Innovations and Solutions
8. Miscellaneous

We invite all conference attendees to volunteer as reviewers, chairs, and discussants at this year's conference. This is a valuable role for long-standing members and first-time attendees alike! You won't regret it!

Stay tuned for more updates.

Your 2024 NERA Conference Co-Chairs

Javier Suárez-Álvarez, Caroline Prendergast, Hannah Smith, and Siyu Wan

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New Member Spotlight



Kat Tremblay

(she/her)

Research Fellow

Center for Educational Assessment at the University of
Massachusetts Amherst

Member of *The NERA Researcher* Editorial Board

NERA Member since 2023

[LinkedIn](#)

Where do you call home?

Born and raised in Holyoke, Massachusetts.

What's something you enjoy that you think more people should consider doing/learning?

Knitting. It's actually an incredibly versatile activity. You can choose a simple, repetitive pattern if you want to relax and just keep your hands busy, or you can choose a more complex pattern with new, elaborate stitches to give your brain some exercise. Either way, you end up with a finished product you made yourself (...hopefully...).

Do you have any words of wisdom you live by/would like to share?

I like to think there's some sort of opportunity for learning or growth in every situation, even the unpleasant ones. If you can identify an area of personal development, come to a new realization, or even just decide that you don't like whatever thing you just experienced, at least you got some sort of value out of it, right?

Are there any goals you're working toward?

I actually just started my graduate education this semester! I'm currently enrolled in my very first class and hope to earn my Master's in Higher Education or Education Policy in the near future.

Interested in being considered for our next Member Spotlight? Learn more [here!](#)

Seasoned Member Spotlight



Elizabeth (Liz) Stone

Independent Consultant

Member of *The NERA Researcher* Editorial Board

NERA Member since 2000

[LinkedIn](#)



Where do you call home?

Las Cruces, NM

What's one of your favorite things about that place/your home?

The scenic desert and mountains are so different from the landscape that I grew up with in PA (which was beautiful in its own way). We are also fortunate to be able to see so many stars most nights and to have lots of sunny days. Of course, I miss having a true autumn and seeing the leaves change, especially as that time often coincides with NERA!

What do you like to do in your free time?

I do the NYT crossword and several other puzzles every day. It is a minor dream to one day construct and submit a crossword and possibly see it published. In the past year or two, I've become a big fan of audiobooks and podcasts. The move away from print books probably has something to do with needing reading glasses these days, but some of the narrators really add to the story.

What's something you'd like to learn more about/spend more time doing?

I'm continuing my quest to learn Spanish. There are so many ways to learn from different angles. I use the Duolingo app for lessons; listen to the Duolingo podcast that has stories in Spanish with English scaffolding (especially the Great Argentine Heist episodes, which told an exciting true crime story); and watch a Friends-type show called Extr@ that teaches Spanish in a sitcom format (it's on Youtube and has several language versions). I also listen to "slow Spanish" podcasts and Spanish-language music, though I only pick out a few words here and there. It helps that there are so many Spanish speakers here and also makes it a more important goal to me.

Interested in being considered for our next Member Spotlight? Learn more [here](#)!

The Leo D. Doherty Memorial Award for Outstanding Leadership and Service

Tia Fechter, *Defense Personnel Analytics Center, 2023 Chair*

Henry (Hank) Johnson

Department Chair, Business Management, New England Institute of Technology

The Leo D. Doherty Memorial Award is given to a longstanding NERA member who exemplified the qualities that Leo Doherty brought to NERA members, his colleagues, and students throughout his career. The award, instituted by the NERA Board of Directors in 1981, honors the memory of Leo Doherty. He was instrumental in developing and growing NERA as a professional association for educational researchers. His leadership qualities, both ethical and humane, encouraged others to pursue and achieve their goals.

The 2023 Leo D. Doherty Award recipient is Henry (Hank) Johnson, Department Chair for Business Management at New England Institute of Technology. Hank has contributed a wealth of service to NERA in a short time, having only joined in 2016. His spirit of wanting to make a contribution began the first day he joined a NERA conference – as I remember meeting him at Parallel Post and Hank asking me about avenues in which he could get more involved and use his skills toward the betterment of NERA.

Since that first meeting with Hank, he has served as Graduate Student Committee (GSIC) Chair, a 2021 conference chair, as a member of the NERA Board of Directors (2021-2023), and as a site selection committee member this past year. As GSIC Chair, Hank organized NERA sessions that focused on the business of consulting: how to set-up, market yourself, and be an effective consultant. “Get involved for the betterment of NERA,” he did.



From Hank's nomination letter, from the now Past-President Bo Bashkov:

Over several years, his expertise and experience were crucial in navigating the onset and recovery from the Covid-19 pandemic, which had many implications on conference planning, contracts, and public health, to name a few. In 2021, Hank served as conference co-chair in our second virtual conference on top of continuing to keep a pulse on the event planning and management industries and negotiating the best possible terms and outcomes on behalf of NERA.

...

Hank has had an enormously positive influence on NERA leadership, membership, and morale. He brought students to NERA who in turn have served for years in various roles, and he keeps a smile on his face even when the conversations get tough. To put it simply, Hank gets things done, and he has fun doing so, too.

Supporting Bo's esteem for Hank, read what our NERA colleagues and leaders had to say:

... it did not take long for me to learn just how much he cares about people in general, his institution, and the NERA organization. I attribute a great deal of our incredible conference success that year, despite being virtual, to his creativity for working with his management to bring on additional support staff, including interns who were able to use their NERA experience toward completing their degrees, and at least in one case have now gone on to serve NERA in other capacities. ... I have constantly been amazed at his agility for constantly walking the fine line that comes with ensuring our conference can be run in the best facility possible, while preserving our strong financial position and not causing undue burden on those making a commitment to attend. Above all this, I cannot express enough how because of our collaborations together as part of NERA these last few years, how much I have come to consider him a true friend. He exemplifies what it means to have a good soul, one NERA is lucky to have, and why I am delighted to endorse his nomination for such a prestigious award. [Jonathan Steinberg, NERA 2024 President]

... I selected Hank as a 2021 conference chair as a result of his great work as GSIC chair and the unique perspective he brings to NERA. However, I had no idea how vital his unique perspective would be. Hank has a background in both public health and business management. When the COVID pandemic hit, those two skill sets were vital to NERA leadership and his expertise in both was truly a savior to our organization. In the process of planning the 2021 conference (and to an extent, the

2020 and 2022 conferences), Hank provided detailed public health updates and even assembled a team of graduate students from his university to help with public health concerns. When we had to take part in difficult contract negotiations in 2020 and 2021 while deciding when and how to cancel an in-person conference in Trumbull, Hank skillfully took the lead and ensured the best outcome for NERA. For this reason, when the site selection committee was assembled, it was obvious that Hank was the perfect choice for the committee. On this committee, he was a driving force to provide NERA with opportunities to use bidding systems that we would have never even been aware of and mentored us in negotiation techniques to get the best contract. At the end, when we renewed our contract with the Trumbull Marriott, he was able to arrange a better contract that NERA has been in years, despite the current economy and hotel prices. Additionally, throughout all of these experiences, Hank was always eager to provide and arrange additional resources to help NERA from his university, including work-study students, interns, video-editing help and social media help. These arrangements provided real-world opportunities for his students while providing NERA with great needed help.
[Steven Holtzman, NERA 2021 President]

I met Hank at my first NERA conference when I was a doctoral candidate. In classic Hank fashion, he shared with me that I “must” join the Graduate Student Issues Committee. Yes he was the GSIC Chair at the time, but his pitch was more about me and how GSIC can benefit my doctoral journey, along with making my NERA Conference experience the best it can be. Well, he was not wrong. I had so much fun getting to know Hank, other graduates, and playing silly games over bits of food and drink at the GSIC Social! Throughout that conference, Hank made it a point to get to know me and my research, which he shared with colleagues when he introduced me. Over the years, Hank and I have become good friends and as he assumed different NERA Leadership roles, I have come to understand his resolve to support NERA in its continued growth is an integral part of his service mentality. ... His demeanor invites us, the members of NERA and its Board, towards excellence.
[Matthew Speno, NERA 2022-2023 Board of Director]

These testimonials speak to Hank’s efforts to expand the NERA network of professionals, providing opportunities to educational researchers they may otherwise not have had. Hank has continued to make NERA better for our entire professional community. Speaking for all the members of the Doherty Committee (Sara Finney, Steven Holtzman, Thanos Patelis, and myself), we send congratulations to Hank Johnson, the 2023 Doherty Award Recipient!

2024 Call for Nominations:

The Leo D. Doherty Memorial Award for Outstanding Leadership and Service

Thanos Patelis, *JHU & KU*, 2024 Chair

The Leo D. Doherty Memorial Award is presented to a longstanding NERA member who exemplifies the qualities that Leo Doherty brought to NERA members, his colleagues, and students throughout his career. The award, instituted by the NERA Board of Directors in 1981, honors the memory of Leo Doherty. He was instrumental in developing and growing NERA as a professional association for educational research.

His leadership qualities, both ethical and humane, encouraged others to pursue and achieve their goals. Thus, it is awarded to NERA members who have exhibited outstanding leadership and service to our organization.

Please nominate a NERA member exemplifying these qualities.

Send a nomination letter in Word or PDF format as an attachment via email to Thanos Patelis (tpatelis@yahoo.com) by **June 30, 2024**. The nomination letter should indicate the name of the nominee, the nominee's e-mail and mailing address, and a concise, compelling indication of the nominee's leadership and service to NERA. Please include input from at least three other NERA members about the nominee's leadership and service either in the nomination letter or separate ones.



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Thomas F. Donlon Award for Distinguished Mentoring

2024 Call for Nominations

Marcia A. B. Delcourt, *Western Connecticut State University*, Chair

The Thomas F. Donlon Memorial Award for Distinguished Mentoring was established in 2000 in recognition of Tom's long and valued contributions to NERA, particularly as a mentor to so many colleagues. Since then, the award has been presented annually to NERA members who have demonstrated distinction as mentors of colleagues by guiding them and helping them find productive paths toward developing their careers as educational researchers.

Mentoring in education has been going on for centuries, and most of us can name a person who helped us move our careers along by being more than just a friend or colleague. That person may have been an advisor in developing your research agenda, or perhaps brought you to NERA for the first time after suggesting that you might be ready for a conference presentation.

Nominations are again being sought for this annual award. Nominees must be NERA members and may be nominated by any member(s) of NERA to whom they served as mentors. If you would like to see a member of NERA who was your mentor be recognized for their contributions to your success, send your nomination, including:

- a. A nomination letter
- b. Three to five letters of support indicating how the nominee distinguished themselves as a mentor.

The award will be presented at the annual NERA conference. Please contact the committee Chair if you have any questions about the Donlon Award or the nomination process. Send all nomination materials to Dr. Marcia A. B. Delcourt via email at delcourtm@wcsu.edu by **June 30**.



2023 Lorne H. Woollatt Distinguished Paper Award Winner

Rochelle Michel, *Smarter Balanced*, 2023 Chair

Congratulations to Rebecca Natow, author of the paper entitled, *Higher Education Title IX Coordinators as Policy Actors: Street-Level Bureaucracy and Beyond*, for winning the 2023 Lorne H. Woollatt Distinguished Paper Award.



The award-winning paper examined how higher education Title IX administrators view themselves and act as policy actors. Data sources included interviews with 28 Title IX administrators from across the United States. Findings illuminate how these administrators interpret, implement, advocate for, and create policy, and how they use discretion when implementing federal law. In addition, it was found that while Title IX administrators are often involved in campus-level policy creation and sometimes join others to advocate for particular policy change, there is more work yet to be done to help improve policies aimed at promoting gender equity on college campuses.

Rebecca Natow will receive a NERA travel stipend to present this paper at the 2024 meeting of the American Educational Research Association. The paper was rated by the award committee members on its relevance, theoretical backing, clarity, design, analytical procedures, and presentation of results and conclusion, and received the highest average rating by the Lorne H. Woollatt Distinguished Paper Award Committee.

The Lorne H. Woollatt Distinguished Paper Award is named in honor of Lorne H. Woollatt, a distinguished New York State educator and NERA member. It is awarded annually, and a plaque is given to the recipient at the subsequent year's conference (October 2024). Research papers from the 2023 NERA conference were submitted by their authors to the award committee for this competitive award.

Any questions about the award can be directed to the committee chair, Rochelle Michel at nera.woollatt.award.submission@gmail.com.

Educator-As-Researcher (E-A-R) Award

2024 Call for Nominations

Marcia A. B. Delcourt, *Western Connecticut State University*, Chair

The Educator-as-Researcher Award is presented annually to an educator who has conducted a self-initiated classroom research project or applied research findings to inform their own practice. Candidates may nominate themselves or be nominated by a NERA member or other professional who knows about their research. The award recipient will be invited to attend the NERA conference to present the research to a NERA audience and receive the award.

The nominee must be a PK-12 educator who conducted a school-related research project with their students, faculty, local community partners, or constituents to improve educational practices. The project must be conceptualized, developed, and implemented as part of the nominee's context and practices and have had at least one cycle of trial and evaluation. The project should also be related to a clearly defined theoretical focus and represent an innovation that has led to concrete change in educational practice. The research, conducted during the past two years, could be part of a thesis or dissertation if the educator is primarily responsible for the development and implementation of the project. Research topics may vary but should have some importance in the nominee's branch of education. The theory underlying the research, as well as methods of instruction or implementation, data collection, and analysis, should be well articulated and documented by the nominee.

Send the application cover sheet (see next page), and narrative as a Word document to Dr. Marcia A. B. Delcourt, Chair, Educator-as-Researcher Award Committee (delcourtm@wcsu.edu) no later than **June 1, 2024**.



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EDUCATOR-AS-RESEARCHER AWARD APPLICATION
55th ANNUAL CONFERENCE, October 2024, Trumbull, CT

Name of Applicant: _____

Affiliation of Applicant: _____

Position of Applicant: _____

Mailing Address of Applicant: _____

(after June 1, 2024) Phone: _____ E-mail: _____

Signature of Applicant: _____ Date: _____

Attach information regarding your submission using the following four guidelines provided:

1. DESCRIPTIVE TITLE OF THE RESEARCH

2. ABSTRACT (Please summarize the research project in no more than 250 words including its purpose, procedure, and outcomes)

3. DESCRIPTION OF RESEARCH (maximum of 1000 words)

a. The rationale for conducting the study

b. Description of project methods including participants, site, and procedures

c. Report and analysis of research findings

d. Discussion of the impact of the research on teacher's practices that occurred or will occur as a result of the project

e. Bibliography of relevant references related to the research

f. Any other information seen as relevant by the nominee

4. SIGNIFICANCE OF STUDY TO EDUCATORS (Describe how the results contribute to improved educational practice or professional knowledge of educators in your field; maximum 100 words)

Name of Nominating Person (if other than the applicant): _____

Phone Number: _____ E-mail: _____

Affiliation and Position of Nominating Person (Please Print): _____

Signature of Nominating Person: _____ Date: _____

Send the application cover sheet and narrative as a Word document to: The E-A-R Committee Chair no later than June 1.

GSIC Report

Matthew Speno, Ed. D., Past GSIC Chair

Our annual conference back in October was a hoot! Personally, this was one of the best conferences I have been to. The conference program was jam-packed with sessions that were relevant, cutting-edge, and meaningful not only to the educational research industry but to our Membership as well! I was so grateful to meet so many Graduate Students who attended the Conference. Thank you!!

Although the GSIC sessions had to be canceled due to extenuating circumstances, the GSIC Social was well attended. I was able to speak to many Graduates about their work, their hopes and dreams related to being a scholar, and how the GSIC can provide a further level of support during their academic journeys. The candor these Graduates exhibited reassured me that the GSIC is an important part of NERA. Some of the stuff Graduates shared they are looking for:

- Support developing strategies to cope with the demands of academia.
- Guidance on how the employment or post-doctoral fellowship processes works.
- Assistance cultivating relationships with other NERA members.
- Advice on how to submit proposals.
- Feedback on their scholarly works, conference presentation(s), or professional goals.

The GSIC exists to provide the NERA Graduate membership with all the above, and more! Each year, we hold a peer-reviewed competition for the Best GSIC Paper that was presented at our previous year's conference. As a committee, we know how scary and nerve-racking submitting your work to a professional conference can be; the Best Paper award not only commends the winner but celebrates all Graduates who submit their conference papers for consideration.

The GSIC Best Paper Winner for the 2022 Conference was Mara McFadden who is a doctoral candidate at James Madison University. I want to extend once again, a humongous congratulations to Mara and all the NERA Graduate Students who submitted their work for the 2022 Award. We look forward to judging the 2023 papers submitted by Graduates who presented at the conference.



If you are a Graduate Student who is a member of NERA or if you are considering joining, please reach out to us with any questions or to express your desire to join the GSIC. 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. Members typically serve a 2-year term. If you are a graduate student and have questions about how to get involved with NERA, contact neragraduatestudents@gmail.com.

Before I go, please know that serving as the GSIC Chair was one of the most rewarding roles I have had, and I want to thank you for the opportunity to serve NERA in this capacity. Please welcome your new GSIC Chair, Tricia C. Clarke:

Tricia is a doctoral candidate in the Innovation in Curriculum & Instruction Ph.D. program at the Fordham University Graduate School of Education as well as an adjunct professor at Fordham's GSE and at Lehman College, the City University of New York. Tricia earned her B.A. in English from Nyack College, her M.A. in English Education from Teachers College Columbia University, and her M.S. in Literacy Education from Fordham University. A former secondary English/Language Arts teacher, Tricia has designed and developed curriculum, facilitated professional development, and coached teachers in writing instruction across content areas, academic and digital literacy, and leveraging educational technology for teaching and learning. Tricia presents her work at professional conferences and is an active participant and leader in select national and regional research and professional associations focused on teacher education and professional learning, writing, educational technology, and literacy.



Be well and make the time to laugh out loud at least twice daily!

Regards,
Matthew Speno, Ed. D.

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Communications Committee Report

Jerusha Henderek, *NBME*, Chair

Happy 2024, NERA colleagues! The Communications Committee kicked off the new year with a couple of changes.

Committee Member Transitions

The Communications Committee would like to thank Dukjae Lee for serving as email coordinator for many years. He has now transitioned to a backup role on the committee, and Archangel Gundula has joined us as our new email coordinator. Please include Archangel on all requests for email communications going forward. Our committee was also pleased to welcome Katrina Roohr this year.

Social Media

If you aren't already, please follow NERA's official pages on our various social media sites.



Communication Request Procedures

With our committee member role transitions, we have a new [Communication Request Form](#). You can always find the latest form on NERA's [Downloadables page](#).

Please submit your forms at least two business days prior to the target date for dissemination. That will allow the committee sufficient time to review and approve prior to sharing your communication.

As a reminder, forms should be submitted to me (Jerusha) at JHenderek@nbme.org with a copy to any coordinator whose communication mode you want leveraged for your request:

- Email: Archangel Gundula (agundula@umass.edu)
- Social Media: Shelby Perry (slperry@neit.edu)*
- Website: Yu Bao (bao2yx@jmu.edu)

*Please note Shelby's updated email address.

Infrastructure Committee Report

Kate Schaefer, *James Madison University*

Hello NERA members!

I hope that 2024 is going well for you. It was great to connect with so many of you at this year's conference. The Infrastructure Committee would first like to thank Nikole Gregg for her years of service as both a member and chair of the Infrastructure Committee. I am happy to introduce myself as the new chair of the Infrastructure Committee. Please direct any chair-related inquiries to me.

In addition, the Infrastructure Committee thanks its returning members:

- Siyu Wan, American Board of Internal Medicine (ABIM)
- Josiah Hunsberger, James Madison University
- Laura Lambert, James Madison University

This year the Infrastructure Committee has been working to recruit at least 1-2 new members. In addition, we continue to work to optimize the Vieth system and aid in the facilitation of the NERA elections.

Please feel free to reach out to the Infrastructure Committee if we can assist you in your NERA work. We are always happy to help where needed. I wish you all well and look forward to connecting throughout the coming year.

Kate Schaefer
Chair, Infrastructure Committee



DIA
Higher Education Collaborators

NERA Mentoring Program Report

The NERA Mentoring Program strives to facilitate meaningful connections for NERA participants through two key approaches:

- 1) conference-based connections and
- 2) year-round virtual events/discussions.

Since 2012, the conference-based Mentoring Program has matched pairs of volunteer mentors and mentees through a focused, hand-selected match-making process. Each year, the Mentoring Program co-chairs collect information from members who volunteer to be a mentor or want to be mentored and match mentor-mentee pairs based on research interests, career goals, or areas of desired growth. Pairs are encouraged to communicate before the annual NERA conference and meet during the conference. Mentoring Program participants benefit from receiving a structured and informed match, having dedicated time during the conference to meet, and the opportunity to make new connections outside of their existing social networks.

We are thrilled to share the highlights from our recent Mentoring Happy Hour held on October 19, 2023, which proved to be a resounding success for our NERA community. With 23 mentors and 32 mentees registering, the event saw active participation from nearly 20 mentors and over 25 mentees. The connections made during this session were truly enriching, with discussions spanning a wide array of topics, including Graduate School Advice, Dissertation Guidance, Manuscript Writing for Publication/Conference Proposals, Professional Development, Leadership, and valuable career/industry insights. It was heartening to witness numerous mentors and mentees extending their collaboration beyond the event. In our post-event follow-up feedback survey, we received a total of 23 responses, each reflecting a 100% positive rate. All respondents expressed their eagerness to recommend our mentoring program to colleagues and friends—a testament to the program's effectiveness and impact.

A special note of gratitude goes to Kerry Vieth and Bethany Fishbein; their unwavering support was instrumental in the seamless execution of this event. We extend our heartfelt thanks to Madison Holzman, our Board liaison, whose exceptional assistance throughout the event played a key role in its success.

As the Co-Chair of the Mentoring Committee, I would like to express my sincere appreciation to Bo Bashkov and the whole NERA team for their dedication and enthusiasm. Furthermore, it is with great pleasure that I welcome our new Co-Chairs, Tabitha Bellamy, and Duy N. Pham.

We are excited about the fresh perspectives they bring to our committee and look forward to collaborating with them to enhance our mentoring initiatives. Thank you all for your ongoing support and commitment to the Mentoring Committee. Here's to the continued growth and success of our mentoring programs!

Please feel free to reach out to the co-chairs at mentoring@nera-education.org should you have any questions or suggestions for improving the Mentoring Program. We are looking forward to working with the NERA membership over the coming year!

Warm regards,

Krishna Chaitanya Rao Kathala
Co-Chair, Mentoring Committee



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This article is the second in a three-part series on qualitative research terminology, procedures, and positioning. Intended for social science researchers new to the qualitative paradigm, Part II explores the challenges and debates regarding qualitative sampling.

Qualitative 101: The Qualitative Sampling Debates

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

Michael Quinn Patton (2020) recently remarked that there is nothing as controversial as qualitative sampling. Many scholars would agree with him.

While qualitative sampling may seem overwhelming or even unnecessarily complicated, it essentially consists of a few interdependent elements: sampling strategies and selection, sample size, data saturation, and triangulation. The debate regarding these elements is persistent and opinions about how to define and apply qualitative sampling strategies are wide-ranging. Yet, each piece is intended to connect the sampling progression in a linear but fluid manner.

There are extensive resources regarding the applications and types of qualitative purposeful sampling strategies, but this discussion will not cover those sources (*see Patton, 2015, p. 266, as an excellent and comprehensive starting point*). Instead, we will examine the ongoing debates regarding some of the most common qualitative sampling challenges.

What's In a Name?

To begin, let's define *sampling*, generally, and *qualitative sampling*, specifically.

Sampling is defined as “the process of systematically selecting that which will be examined during the course of a study” (Qualitative Research Guidelines Project, 2008, para. 1). Quantitative probability sampling differs from qualitative non-probability sampling in notable ways. In probability sampling, a representative group is selected from the larger population and statistical results can then be extrapolated to that larger population with calculated confidence. In non-probability sampling, participants are selected intentionally, but without generalizing the findings.

Not only are the techniques different for these two approaches, but the very logic of each approach is distinct. Patton (2015) notes:

The logic and power of qualitative purposeful sampling derives from the emphasis on an in-depth understanding of specific, info rich cases which are cases from which one can learn a great deal about issues of central importance to the purpose of the research, thus the term purposeful sampling. (p. 265)

Patton continues by saying that what would be “bias in statistical sampling, and therefore considered a weakness, becomes the intended focus in qualitative sampling, which is considered a strength” (p. 265). This strength reinforces the advantage of a small sample which is to seek an in-depth exploration of the particularity of the cases reflecting the phenomenon under study.

Quantitative researchers often fail to understand the value of small samples found in qualitative projects. This is related to the misapprehension that generalizability is – and should always be – the ultimate goal of all good research. While quantitative probability sampling is designed for generalizability, qualitative research focuses on the peculiarity of a few cases studied in great depth to understand those cases, intentionally limited in scope but intensive in detail. This does not mean, however, that qualitative findings cannot be effectively applied to other settings or populations similar to those from which the findings were derived. They can be transferred, rather than generalized, with equal success (Patton, 2015). Ultimately, all qualitative sampling is non-probability because generalization to a larger population, of which the sample is representative, is never the goal.

Qualitative Sampling: The Strategy of Selection

The nomenclature applied to qualitative sampling is multilayered and somewhat contentious. As discussed in the first article in this series, the terms most commonly associated with qualitative sampling are purposive and purposeful. They are used interchangeably, sometimes within the same narrative (*see Patton’s 2015 explanation for the use of both terms, p. 265*). Patton intentionally chooses the designation of “purposeful” over “purposive” regarding qualitative sampling; other scholars prefer “purposive” over “purposeful,” but the meaning is the same (Abrams, 2010; Holland & Shaw, 2014; Polkinghorne, 2005). It remains a matter of semantics and disciplinary orientation.

Purposeful sampling is the strategic, intentional “selection of information-rich cases” to study, which, by their nature and substance, will illuminate the inquiry (Patton, 2015, p. 264). It represents a series of iterative decisions throughout a project in order to adapt to and address the research question (Guetterman, 2015). Guetterman (2015) further notes that “sampling is not a matter of representative opinions but a matter of information richness” (p. 3). Qualitative purposeful sampling must then be assessed in the context of the study and key aspects of the research design and purpose. Studying carefully selected cases in depth allows for a greater and more intensive exploration of the phenomenon.

It is important to understand that qualitative purposeful/purposive sampling is not a stand-alone activity but consists of an interconnected series of activities or practices that reinforce the study's focus. Sampling decisions reflect the research design; a mix of sampling sub-strategies are subsequently employed, and may change or be supplemented during research. Therefore, a high degree of ambiguity resides in all facets of qualitative research including the judgments related to sampling.

Interestingly, the debate about the terminology regarding who is selected for a sample persists among scholars. Saunders and Townsend (2018) suggest the granular distinction of "choosing participants" rather than "selecting a sample," and even go so far as to argue that "participants," rather than "cases" or "elements," should be identified (p. 1). Regardless of the labels, the final determination of participant selection rests with the individual's right to participate, i.e., to give consent. Thus, these debates do not change who is in a study, in spite of nomenclature preferences.

Additionally, scholars may refer to theoretical, judgment, or selective sampling designations when referencing qualitative sampling. How do any of these differ from purposeful or purposive sampling? Judgment sampling is defined as a method where the researcher selects participants who can help the researcher answer the research question (Oppong, 2013); selective sampling is defined similarly. For practical purposes, both terms are synonyms for purposeful sampling.

Theoretical sampling is a bit different in that it is defined as the process of "selecting incidents, slices of life, or people on the basis of their potential manifestation or representation of important theoretical constructs" (Patton, 1990, p. 177). This method focuses on theory and concept development and is considered an iterative sampling process based on emerging theoretical concepts (Glaser & Strauss, 1967). Originally associated with the grounded theory methodology, theoretical sampling is considered a subset of purposeful sampling but with a very different emphasis. As a label, theoretical sampling is sometimes applied to other types of qualitative inquiry, but there is considerable disagreement regarding the definition and application of its use.

A word about the misguided consideration of convenience sampling in qualitative research must be offered here. Some researchers refer to convenience sampling as one of the foundational qualitative sampling strategies (Lopez & Whitehead, 2013; Oppong, 2013). Other scholars reject this notion (Holland & Shaw, 2014; Morris, 2006; Patton, 2015) and insist that convenience sampling is not strategic, intentional, or selective enough to be used in a qualitative project. The core of these debates centers on the implication of the term "convenience," where those who defer to convenience sampling misunderstand the seeming availability of participants as a form of "convenience", i.e., the researcher can access participants for their study easily and without a gatekeeper. In fact, convenience sampling is counter to qualitative sampling strategies; this

approach belies the role of the researcher in “hand-picking” data sources from a criterion-based recruitment process, one where selection is calculated.

Sometimes researchers refer to purposeful sampling as separate and apart from the long list of other qualitative sampling strategies. This is misleading; all qualitative sampling is intentional, based on hand-picked sources that the researcher determines will yield the best and richest information to answer their research objectives. Therefore, all qualitative sampling is purposeful (purposive, selective, judgment). The question is then how to determine which sub-strategies must be applied to different populations and sources embedded in the study. In other words, you might apply criterion sampling for your expert and practitioner interviewees; you might use maximum variation sampling for focus group attendees; you might consider snowball sampling for hard-to-reach or sensitive sources in your study, or even as a part of the same study that employs these other strategies. They are all purposeful in design, and all qualitative projects will employ multiple sampling sub-strategies under the umbrella of purposeful selection.

Sample Size: Is There Such a Thing as Too Small?

One major stumbling block for many audiences is the issue of small sample sizes. For quantitatively oriented individuals, a small sample size may seem like a serious problem. As noted above, the role of sampling in a qualitative study differs vastly from the role of sampling in a quantitative study. This impacts the selection and size of the final sample. Qualitative inquiry focuses on intentionally small samples, even single cases, selected purposefully to permit inquiry into and the understanding of a phenomenon in depth. This is an issue that confuses researchers deeply: How should a qualitative researcher determine an initial or final estimate of participants? How many is enough? How should those initial numbers be determined? As Patton (1990) indicates:

There are no rules for sample size in qualitative inquiry – it depends on what you want to know, the purpose of the study, what is at stake, what will be useful, what will be credible, and what can be done in terms of time, resources, and reach. (p. 184)

Yet, problems arise when those small purposefully selected samples are judged on the basis of the logic, purpose, and recommended sample sizes associated with probability sampling (Merriam & Grenier, 2019). Purposeful sampling should be judged according to the rationale for the qualitative study, i.e., does the sampling strategy support the study’s purpose? Further, the answer to the question, “How big does the sample need to be?” is “It depends” (Patton, 2020). This causes significant frustration for many researchers. A small sample only seems small to researchers when compared with sample sizes needed for representativeness and when the purpose is to generalize results (Guetterman, 2015; Patton, 2015).

As Saunders and Townsend (2018) maintain, sample size is that “number considered sufficient [and] depends on a balance between the research purpose, saliency of data obtained, what is considered numerically credible by the researcher’s community, and the researcher’s [stance]” (p. 11). Thus, an appropriate sample size for qualitative studies is one that adequately answers the research question. Again, the goal is never to collect data from a representative sample in order to generalize the findings to a larger population. Qualitative findings can, however, be applied to other settings or populations; the concept of proximal similarity is the principle where qualitative data can be extended and applied to settings, populations, outcomes, and times most similar to the original research (Campbell, 1986). In other words, qualitative research does not need generalization to be valuable but it does need transferability – i.e., the ability to transfer the qualitative design and/or outcomes to other highly specific contexts: “We generalize qualitative findings confidently when we can specify the range of persons, treatments, settings, or populations in which the findings hold more strongly over repeated inquiries” (Polit & Beck, 2010, p. 1453). Patton (2015) reinforces this assertion by adding that cases in the sample must reflect the same experience or perspective regarding the inquiry.

Determining adequate sample size in qualitative research is ultimately a matter of judgment and experience (Patton, 2015). The research literature must be the final arbiter for the researcher. Scanning numerous extant studies to identify the sample sizes for similar projects is the preferred strategy for projecting sample estimates (Sandelowski, 1995). This then is the challenge of small samples in qualitative research – to ensure that the sample is not so small as to limit richness in findings, or that one’s judgment is somehow skewed, or that the method employed prevents the collection of rich data, or that the researcher is unable to develop a close rapport with participants (Sandelowski, 1995).

Data Saturation

One unique feature of qualitative research is the concept of data saturation, linked intimately with small sample sizes and their viability. Data saturation is the key to determining when a sample size has reached its limits and when the researcher has achieved a saturation point in the data collection process. So, what is data saturation? Suter (2012) defines saturation as the “point in continuous data collection that signals little need to continue because additional data will only serve to confirm an emerging understanding” (p. 350). Guest et al. (2006) assert, and O’Reilly and Parker (2013) concur, that saturation has become the “gold standard” against which the diversity of samples is determined in a project. Additionally, thematic saturation, a general approach to qualitative data immersion, is distinguished from theoretical saturation. Staller (2021) notes that theoretical saturation occurs when “collecting more empirical evidence isn’t producing any additional theoretical insights” (p. 6). Still, all of these scholars agree that saturation, as a practice, appears to hold multiple meanings, which extends the confusion around the terminology.

Regardless, saturation remains the goal in qualitative data collection. Qualitative researchers offset the need for large samples with the sampling and participant involvement until they achieve information redundancy – the point at which no new information or themes emerge from the data. Sometimes data saturation and data redundancy are mentioned interchangeably in the literature. Scholars generally agree that both terms imply the point at which additional data collection may not yield any new discoveries, new insights, or new patterns, as translated into narrative findings. This endpoint leads to a determination of data saturation, which closes the loop on determining sample sizes.

Triangulation as the Final Consideration

The final element in the qualitative sampling process is the triangulation of data, which is the quest for data verity, corroboration, and credibility. Lincoln and Guba (1985) established the framework for the trustworthiness of qualitative data by identifying its four original categories: credibility, confirmability, dependability, and transferability. Triangulation plays a key role in two of these categories: credibility and confirmability.

By definition, triangulation is a method used in qualitative research that involves cross-checking multiple data sources to evaluate the corroboration of all the findings (Suter, 2012, p. 350). As Suter (2012) suggests, qualitative data collection is typically supported by multiple data sources, which satisfy the goal of triangulation. This concept of cross-corroboration in a qualitative project is inexorably linked with the qualitative sampling approach. To secure compatible and cross-validating data sources, sampling for each source must be appropriately applied within the framework of the study. Accomplished through methods, data, analysis, or theoretical corroboration, triangulation is an effective approach to the holistic and verifiable analysis of a phenomenon (Lincoln & Guba, 1985).

Final Thoughts...

The elements included in the qualitative sampling progression described above are essential to implementing a successful qualitative sampling strategy. Each element plays an important role in the sampling process. In all of this, the qualitative researcher serves as the “glue” that makes this interconnected sampling process work effectively. The guiding principles of qualitative sampling are rooted in the commitment to the unique perspective of the individual, the acceptance – and even promotion – of small, strategically selected, and carefully positioned set of data sources and/or individuals that allow for an intimate and robust view of a phenomenon. When all the pieces of a project converge, the researcher is empowered to tell participants’ stories with all the richness and distinctiveness essential to the qualitative stance.

Part III, the final article in this series, will describe how a researcher establishes and practices positionality in a qualitative project.

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district or even state level. So you need state boards of education to buy into this—and thankfully this is happening in more and more states—Mississippi was the first state to lean into this new pedagogy of early literacy development back in 2013—and since then more than 30 other states have followed suit. But just adopting a new approach from the top, doesn't mean it magically transforms districts and schools overnight; it takes training and time.

A national survey of more than 800 U.S. parents commissioned by Lexia found that just over 50% of parents strongly agree that their children's teachers are properly trained in the science of reading. However, Lexia's own nationwide survey of educators found that only 27% of educators felt the same (Business Wire, 2023). So, this is where we are—the intention is there, the good ideas are gaining steam, and change is coming, but it is going very, very slowly. How can we speed things up, you ask? Education leaders need more capacity to implement these changes. What are school and district admins' top challenges? Making do with limited resources. So for starters, more teachers would be nice. The problem is, many states don't have enough teachers as it is (Scholaroo, 2023). Now, it could be that teacher education programs aren't producing enough teachers. It could be that the teaching profession is exhausting, and the pandemic only contributed to teacher burnout, and more teachers quit teaching to pursue other careers. But it could also be that teachers simply can't afford living on a teacher's salary. In several of the largest U.S. metro areas, new teachers cannot afford the average rent for a one-bedroom apartment (National Council on Teacher Quality, 2023). In many more areas of the U.S., the median homeowner costs are more than 30% of the estimated gross salary for teachers with a bachelor's degree and 15 years of experience (Axios, 2023). It's not difficult to see how these conditions can negatively impact the educator workforce, with some states waiving the college degree requirement altogether to patch things up (Education Week, 2022).

But even at full capacity, where every classroom is staffed, a teacher is still expected to attend to each and every student, which can be extremely taxing. If there was only an app to help teachers attend to every learner's needs all at once! Well... there are a few different apps. In fact, according to a recent analysis by Instructure (2023), the average school district accessed an average of 2,591 distinct edtech tools throughout the year, with individual teachers and students using 42 different tools. The U.S. edtech market was valued at nearly 70B in 2022, with a compound annual growth rate of over 16% over the past 5 years (Global Data, 2023). Covid-relief funding played a key role in this booming growth, but rest assured that educational technology is here to stay.

With the public release of ChatGPT a year ago, and other generative AI models on the rise, this momentum will continue; edtech tools will continue to improve, but few will withstand the test of time and accountability. You see, we want technology to help educators and learners, not distract or hinder learning. Just because something is available, doesn't mean that it will be

used, or that it should be used. Beyond significance testing, how large an effect does your product have on learning? Unlike other fields, effect sizes in broad educational contexts of .2 or higher are actually considered large.

You've probably heard of the 2-sigma problem. In 1984, Benjamin Bloom found that with one-on-one tutoring, a student performing at the 50th percentile could improve by 2 standard deviations. The challenge is: how can we achieve this effect at scale? Now, some people believe that generative AI can solve this problem. In fact, some products have already launched chatbots. But I am not convinced that's necessarily the right approach, at least not right now. According to a recent EdWeek survey, 45% of educators say they aren't comfortable with AI technology they've encountered or expect to encounter in the next year in their classroom (Education Week, 2023). So, what do we do?

I would argue that powerful *personalized learning* that's supervised and supported by teachers, and produces real-time data for admins, teachers, *and* parents is a much more effective way to support students than sending them off to talk to a friendly but often confabulating chatbot. We want technology that is effective and efficient, but also safe, secure, and equitable.

Effective edtech platforms need to be grounded in learning sciences research, designed with the user and stakeholder needs and preferences in mind, and produce measurable results in the impact they intended to make in their application domain. Unlike the mandates of accountability testing that came with the *No Child Left Behind Act* of 2001, the *Every Student Succeeds Act* of 2015 came with non-regulatory guidance on using interventions that are evidence-based according to a framework including four tiers of efficacy evidence (WWC, n.d.). At the top is ESSA Tier 1, strong evidence of efficacy based on a randomized control trial or regression discontinuity research design. Tier 2 provides moderate evidence and requires a quasi-experimental pretest-posttest control group design, and so on.

Those of you who've embarked on this kind of work are privy of the challenges of conducting a true experiment in the field. Finding district partners who will allow you to randomly assign participants to an intervention is only half the battle. But let's assume you've accomplished that. Even if your program is implemented with fidelity, you operate in a reality where your control group is not only implementing the core curriculum, but also using a combination of supplemental tools. So really, your product needs to outperform any and all of the 41 other products that the average classroom is using. So maybe we should re-consider how we measure efficacy. How can we judge an edtech product's merit independently in an objectively confounded reality? Not only that, but collecting strong evidence of efficacy can take years. How can we do this more efficiently?

On that note, let's talk about product efficiency. **Efficient** edtech tools need to be user-friendly and produce measurable results quickly. How much progress can a student make per

unit of time spent engaging with the product? More importantly, what are the optimal ways to implement an edtech product to support educators and learners? The first question is fairly straightforward. You identify the most salient product usage predictors of subsequent academic performance, and you create projections that can inform edtech implementation *and* accountability against progress goals. The second question? Not so much. A *good* product provides effective, straightforward solutions. A *great* product is flexible enough to accommodate numerous use cases and empower teachers to help students learn exactly how they see fit. Even the best edtech products cannot and will not replace teachers, but the ones that prevail will make their work a whole lot easier.

So great products really need to tap into all areas of learning and draw upon decades of research to succeed on the efficiency front. From research on how students at various ages and development levels learn, to standards and textbook alignment, to lesson planning, to assessment, to differentiating instruction, to integrating edtech into multi-tier systems of supports, to motivating students to learn and celebrating their progress, there is so much opportunity to get efficiency right *and* terribly wrong, but that's a whole other discussion.

When it comes to educational technology, **safety and security** are really two sides of the same coin—privacy is at the core. Just as we want kids to be safe in schools, we want them to be safe online while using educational technology. It's true that screen time and content are important factors here, but perhaps the biggest challenge boils down to student privacy: how much information does edtech really need to collect? How does it keep it secure? For how long does it need to retain it? How transparent is the provider about all of this? Having an easy to find and clear privacy policy is the bare minimum. In addition to that, regular training is absolutely necessary. Most importantly, keeping yourself and those you work with accountable about data privacy is the best way to ensure edtech is safe and secure.

We also need training and accountability around diversity, equity, inclusion, and justice.

“When someone with the authority of a teacher describes the world and you're not in it, there's a moment of psychic disequilibrium, as if you looked into a mirror and saw nothing.”

— Adrienne Rich

There are so many books, and talks, and all kinds of media through which we can learn both independently and together. We have no excuses to stay ignorant. Being idle is being complicit. Thankfully, we stand firm on this here at NERA. The last two days we've heard a fair amount about issues of equity. This brings me back to my topic: we need educational technology that is equitable. And this includes pretty much all aspects of equity: access, content, functionality, outcomes... Earlier I mentioned how exams like TOEFL and the SATs gave me a

chance. Well, to me edtech can play a significant role as we strive to equalize the opportunity to learn, but this does come with pre-conditions that need to be in place first, and even more coordination—all of us working together.

Let's start with access. While internet and technology access increased overall during the pandemic, socioeconomic disparities persisted, so many learning and achievement gaps unfortunately widened. The U.S. has the highest GDP in the world, yet universal access to essential tools for learning is still lacking. This needs to change.

But access is just one piece of the puzzle. When you have so much going on at home, how do you focus at school and at work? How do you carve out the mental capacity for learning? At the very base of Maslow's pyramid are the physiological needs, but we know there are many other factors that impact learning. There is learning ability and special needs, there are language barriers, there are social and emotional factors like inclusivity and sense of belonging, psychological safety, and so much more. How many of these can educational technology help with? Some more than others. These are all challenges. They are also opportunities.

And you might be skeptical. If edtech has a modest effect on learning in terms of test performance, its effect on these other factors must be even smaller! Maybe. But small to moderate correlations are good: they give us clues but leave room for innovation—what else can we discover in terms of factors that impact our daily lives? If you're looking to make an impact in the world, research and find these out so you can really move the needle.

Of course, in all of this work, we need partners. As brilliant as policy researchers in high ivory towers may be, we need to work with practitioners, admins, para-professionals, community leaders, parents, and last but not least—students. And you may be questioning—what can *I* do in my brief career when many of these challenges have persisted for many generations? You do your part, and let others do theirs. You can do a lot in a lifetime! It took humanity only 66 years from the first flight to the first landing on the moon. Working together, we can accomplish a lot!

TOGETHER WE CAN!

So, let's get to work!

Bo Bashkov, Ph.D.
NERA 2023 President

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